ezScriptWriter User Manual

ezScriptWriter

Prescription Writing Software

by Iccomplish, Inc

ezScriptWriter User Manual

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Part I

1 How to Use this Manual

Navigating this Manual

This User's Guide is provided in both printed and electronic form, searchable with most commonly available document viewing programs. If you cannot locate an index topic you need, please do a text string-search for the relevant word or phrase, or related words.

The screenshots shown throughout this guide have been taken with a relatively small window size. The default display is a window that fills the screen. Click once on the **Minimize** button (upper right-hand corner of window display) to get a smaller working area; click on the **Maximize** button to return to full-screen display.

The screenshots have been taken with the next-to-last version of the software. We have made every effort to match what you will see in ezScriptWriter with what the guide shows, but there may be slight discrepancies.

This guide assumes you have basic familiarity with using a mouse and file manipulation in Microsoft Windows. This manual was written using a tree structure (for example, topics are listed in a hierarchical branching format). If the tree is fully closed, click the "+" sign in the box icon ⊞ to the left of the node icon to open up the first branch, then repeat this process to open up further branches. Alternatively, click the blue underlined hyperlinks on this page to jump to the main sections.

If you want to move down the tree using the keyboard, press the **Tab** key. This will take you to all subtrees that are currently open.

Conventions Used in this Manual

Click refers to clicking a menu item, a button or a clickable icon (tool button).
Press refers to pressing a keyboard key or key sequence.

Mouse and Keyboard Notation

Mouse Notation

Unless otherwise specified, **click** refers to clicking the left mouse button once. Where there might be ambiguity, the terms **left-click**, **right-click**, and **double-click** (using the left mouse button) will be used.

Drag-and-drop refers to dragging an object with the mouse cursor while keeping the left mouse button depressed, then releasing the left mouse button to "drop" the object.

Keyboard Notation

Keyboard key combinations are shown in boldface, for example, **Backspace** means “Press the

Backspace key."

The **Control** key is shortened to **Ctrl.** For example, **Ctrl+A** means "Press the **Control** key, and while holding it down, press the **A** key."

The **Alt** key is an abbreviation for **Alt**ernative.

The **Shift** key is not abbreviated.

Shift+Ctrl+A means "Depress the **Shift** and **Control** keys, and while holding them down together, press the **A** key."

Note: You can choose the **Shift**, **Ctrl** and **Alt** keys from either side of the keyboard, according to convenience.

The **Escape** key is abbreviated as **Esc**.

To **select a node** means to click its icon or title in the Tree view on the left side, or move the Tree view cursor up or down using the cursor (arrow) keys, until the desired node is highlighted.

Mouse Conventions

You may perform several actions during your work with this software; the following specific words are used to describe them:

- **Point to –** move the mouse pointer to an item.
- **Click** or **Left-click –** point to an item and press the left mouse button.
- **Right-Click –** point to an item and press the right mouse button.
- **Double-Click –** point to an item and quickly press the left mouse button twice.
- **Drag –** point to an item and press and hold down the left mouse button while you move the item.
- **Select –** highlight or make an interface element active by either clicking it or dragging over it (other actions are possible, if specified in the documentation). If used in **select the check box**, it means that the check box should be marked with a tick (as opposed to **clear the check box** when the check box should be cleared, without a mark).

Keyboard Conventions

Keystroke commands are noted in bold letters. Command key combinations are separated by the dash symbol ("-"). This indicates that the noted keys are to be pressed simultaneously. For example, **Alt-S** signifies that you should hold down the **Alt** key while pressing the **S** key. Bold lower-case letters indicate operating system commands and command lines. For example, you would enter **copy *.*** on the command line exactly as written.

Menu Notation

Menu selections are shown in boldface italics to distinguish them from commands and the rest of the text. An instruction such as "Click ***File / Save***" means "Click the word ***File*** on the Main menu (located at the top of the window) and when a drop-down menu appears, select ***Save*** from the list of options.

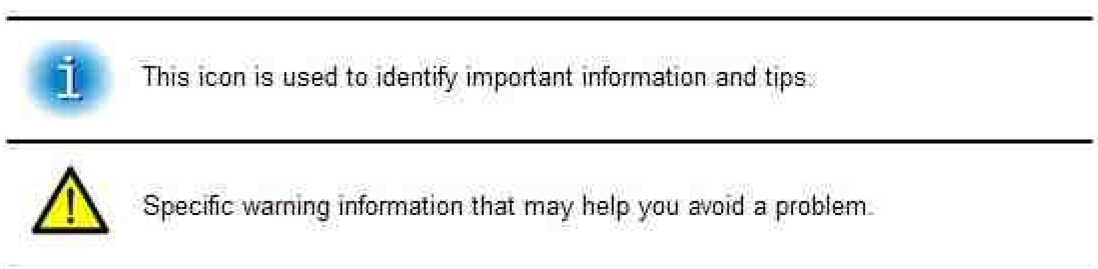
If the words in the menu appear faint or "greyed-out," this means that the menu option exists, but is unavailable (disabled) right now.

When there is a specific order of buttons to click, they will be separated by the arrow symbol "**-->**"; to complete the action follow the sequence exactly as presented.

For an explanation of **keyboard shortcuts** and **menu access keys** see Making it all happen.

Other Conventions Used in this Manual

Besides icons noting specific operating systems throughout this manual, the following are used to indicate specific types of information. The applicable information follows each icon in indented paragraph format as shown below:



Part II

2 Overview of ezScriptWriter

What is ezScriptWriter?

ezScriptWriter is a powerful, yet easy-to-use software system for creating and printing medication and/or ophthalmic prescriptions. It includes a built-in word processor, report editor, Rx logbook feature, reminders and note documentation tool in one application, which you can use to organize your patient demographics, Rxs and other data.

Program Structure

ezScriptWriter uses familiar images as the cornerstone of the user interface. For example, a patient chart looks similar to what you would see in the paper format. Rx's and notes are presented in lists that can be double clicked to call up the appropriate report. The report editor is similar to standard word processors available in Windows XP.

Certification

Our ezScriptWriter software is very low cost (only $189 per year per location with unlimited computers/users) and does not include any EHR features (other than ability to create Rx's and scan in paper charts), so we are not pursuing certification. However, because some of our doctors see a significant amount of Medicare patients, we have partially integrated with PracticeFusionEHR.com. That site is a free EHR and has ONC certification. Sponsored in part by Dell Computers, they are the leading free EHR solution. This fits nicely with our own low cost software model. The website is fairly limited in optometric functions (which is where our software comes into play). You simply paste your SOAP note to the site and keep a parallel system online. So it also functions as a “backup” of your SOAP notes that can be accessed anywhere there is internet.

To qualify, you have to be an eligible provider who bills CMS. Next, you need to use a certified EHR system and meet 20 criteria for Meaningful Use. For 2011, you will to attest to CMS that you met the Meaningful Use criteria for 90 consecutive days and your incentives will be paid with your reimbursements.

Practice Fusion's EHR is ONC-ATCB 2011/2012 compliant and is certified as an EHR Module in accordance with the applicable certification criteria adopted by the Secretary of Health and Human Services (HHS).

1. Record patient demographics (including gender, race and ethnicity, date of birth, preferred language) at least 50% of the time
2. Record vital signs (height, weight, blood pressure, body mass index, and growth charts for children) at least 50% of the time
3. Maintain up-to-date problem lists at least 80% of the time
4. Maintain active medication lists at least 80% of the time
5. Maintain active medication allergy lists at least 80% of the time
6. Record smoking status for patients older than 13 years of age at least 50% of the time
7. Provide patients with a clinical summary for each office visit within 3 business days, at least 50% of the time
8. On request, provide patients with an electronic copy of their health information (including test results, problem lists, meds lists, allergies) within 3 business days,

at least 50% of the time
9. Generate electronic prescriptions at least 40% of the time
10. Use Computerized Physician Order Entry (CPOE) for medication orders at least 30% of the time. (note: CPOE for lab ordering, imaging ordering, and referrals are not addressed here – only medications)
11. Implement drug-drug and drug-allergy interaction checks at least 40% of the time
12. Be able to exchange key clinical information among providers by performing at least one test of the EMR's ability to do this.
13. Implement one clinical decision support rule, and ability to track compliance with the rule (this is reduced from the previous 5 rules to the final 1 rule)
14. Implement systems that protect privacy and security of patient data in the EMR, by conducting or reviewing a security risk analysis, and taking corrective step if needed
15. Report clinical quality measures to CMS or states – for 2011 provide aggregate numerator and denominator through attestation; for 2012, electronically submit measures (this refers to PQRI measures)

Rx Wizards

In order to quickly build a Rx, a wizard is available to walk you through the process. Whether you are creating a medication Rx, a spectacle Rx or a contact lens Rx, the wizard gives you the tools to easily enter your prescription data. One of ezScriptWriter's great strengths is that it allows you to create Rx's based on prior data, simply by double clicking on a past Rx in the Logbook

It should be mentioned that ezScriptWriter does not oblige you to use the Rx Wizard at all. For example, for custom Rx's you can simple open a blank report and manually type your data.

Reports

Although functioning mostly to generate Rx's, ezScriptWriter can also help you save time by generating letters, reports, and patient handouts. Many pre-existing sample reports are included or you can build your own!

Compatibility

Since ezScriptWriter can export data in both text and PDF formats, you can send your Rx's and letters in e-mail or simply create backup copies that can be opened on any computer.

2.1 Evaluating the Software (Free Trial Period)

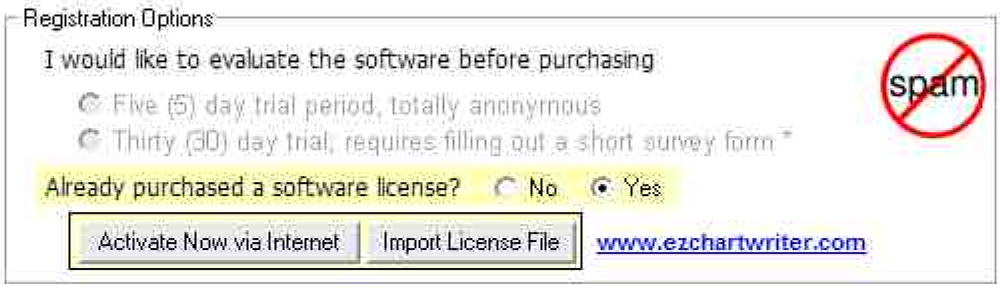
ezScriptWriter is free to try for up to the first 30 days, during which time the program is fully functional. Beyond this limit, you need to register the software. You should keep the following in mind when evaluating ezScriptWriter:

- The installation of a fresh version of ezScriptWriter over a previously installed evaluation version does not prolong the original 30 day evaluation period.

- Each location (clinic) that uses ezScriptWriter will have its own uniquely assigned serial ID number and account number. Your account number is your practice telephone number. When you register the software you will be asked to provide your practice telephone number; please provide a valid and accurate number. If your telephone number should change in the future, you will need to re-register your software. If you have two (or more) locations, each will require a separate registration number.

2.2 Register/Activate software

To register ezScriptWriter, you simply need to download the **activation** codes automatically once the software is properly licensed.



ezScriptWriter will run unregistered for up to 30 days. When unregistered, the software runs without limitations of any kind; what you see is what you will get.

When you run an unregistered version of ezScriptWriter in excess of the allowed 30 days, a window will appear displaying the expiration status of your trial and giving you the opportunity to do one of the following:

- **Purchase** your version of ezScriptWriter (with the Purchase Software button or directly via the ezScriptWriter website);

- **Register** your version of ezScriptWriter by using the online activation (or CD-ROM) you once you have purchased your license(s); or

- **Exit** the unregistered program.

You can also find the Purchase/Register options by logging in as the **Adminsitrator** and clicking **Admin Settings --> Software Account.**

Once you register ezScriptWriter, you will notice that the **View Licenses** menu of the Administrator screen displays your serial number and registration status.

The registration Web page, where you can purchase and register your ezScriptWriter software is located at www.ezScriptWriter.com/order.htm

If you have more than one clinic location, each will need to be individually registered since each will have a separate database and account number (which is the practice telephone number).

You DO NOT have to purchase a license for each computer and/or user; we license only the single clinic location.

2.3 How to Purchase

We recommend you use the internal Order Form built into the ezScriptWriter software. You can also find the Purchase/Register options by logging in as the **Adminsitrator** and clicking **Admin Settings --> Software Account.**

For detailed information regarding how to buy a software license, visit the website order form at www.ezscriptwriter.com

2.4 Hardware Requirements

We highly recommend that you use a computer system with more than the minimum requirements to improve performance and speed. Also, the choice of network greatly impacts the speed at which you can access the database. Wireless networks should only be used for light-duty workstations.

You can find up-to-date information about system requirements by visiting our website located at www.ezScriptWriter.com

Before you start using ezScriptWriter, you should have a working knowledge of your PC and your operating system. The software is designed to operate under Windows XP/2000/2003. You should know how to use a mouse, keyboard, the standard Windows menus and commands, and how to open, save, and close files. For more information, consult your Microsoft documentation.

To use ezScriptWriter successfully, you need to a printer (preferably a Laser printer, although an inkjet will work). And, of course, you need a computer that is capable of running ezScriptWriter. A network setup is very desirable, as this will allow frontdesk staff to enter the basic patient demographics and to print letters for patients at the front counter.

Recommended Paper
No Security Features: Weyehaeuser 20 lb. pre-perforated copy paper (at 5 ½")

- Available by the case from Office Depot or a similar office supply store
- Advantage: Low cost
- Disadvantages: Easy to alter; not valid in some states

Security Paper: Secure Laser Rx Paper (various formats)

- Includes security background (word VOID appears when photocopied)
- Erasure protection
- Advantage: Nearly impossible to duplicate/alter
- Disadvantage: Much more expensive than copy paper

NOTE: If you intend to print computer-generated medication Rx's, please check with your state

Pharmacy Board to verify that they will be acceptable in your state or locality. Some states, for example New Jersey, require pre-numbered prescription blanks.

Recommended Printer

KONICA Minolta-QMS PagePro 1350-W Laser Printer

- 21 pages-per-minute
- 1200 dpi, 8M
- Can usually be purchased for under $200 online or at any computer superstore

Recommended Network Gear

Wireless Pre-N Broadband Router

Click here to visit the Belkin website.

- Allows both wired and wireless connections
- Can usually be purchased for under $100 online or at any computer superstore

NOTE: ezScriptWriter will operate much slower on a wireless network than over a wired ethernet system.

Part III

3 How Do I?

"**How do I?**" help is available on most screens in ezScriptWriter. Many times you will be brought directly to the topic that relates to the screen that you are viewing. You can also jump from topic-to-topic or use the search feature. Other help resources include the PDF manual and the Frequently Asked Questions (FAQs). Access these areas from the Main Login Screen.

How do I ?

[Get started using ezScriptWriter?]
[Use the Admin functions?]
[Create a new patient?]
[Open an existing patient?]
[Use the QuickFind tool?]
[Create a Rx?]
[Create a Report?]
[Create a Note?]
[Scan or Attach Documents?]

The quickest way to display the help is to press F1. If context-sensitive help is available it will be displayed automatically.

Most of the screens in ezScriptWriter have a Help button that displays relevant information.

Select the Help item in the menu bar for additional help options.

3.1 Installation and Setup

Step 1 - Download and Install

After you have downloaded the software from the website (www.ezScriptWriter.com), you must double-click on the setup file to begin the installation process. The setup file is called "ezscriptwriter_setup.exe" and is usually located in your My Documents or Downloads folder. Follow the on-screen prompts to complete the installation process.

NOTE: You must install ezScriptWriter on every computer on your network that you wish to connect to the database.

Step 2 - Setup the Software for First-Time Run

On the computer you wish to keep the database (e.g. the "primary computer" or "server"), double-click the ezScriptWriter icon to begin the Setup process. The Setup Wizard will appear.

See the Networking Tutorial for details of how to setup your network. This tutorial can be accessed by clicking the tutorial button on the setup screen:

3.1.1 Using the Setup Wizard

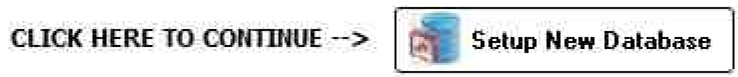
The first time ezScriptWriter is accessed, the **Networking Wizard** displays to guide you through configuring the program according to your custom settings (even if you do not plan to install on a network, you must follow these steps).

1. Open ezScriptWriter. The Program Splash Screen displays; click **Continue**

2. Click **Start** to start the wizard. The Networking Wizard window displays:

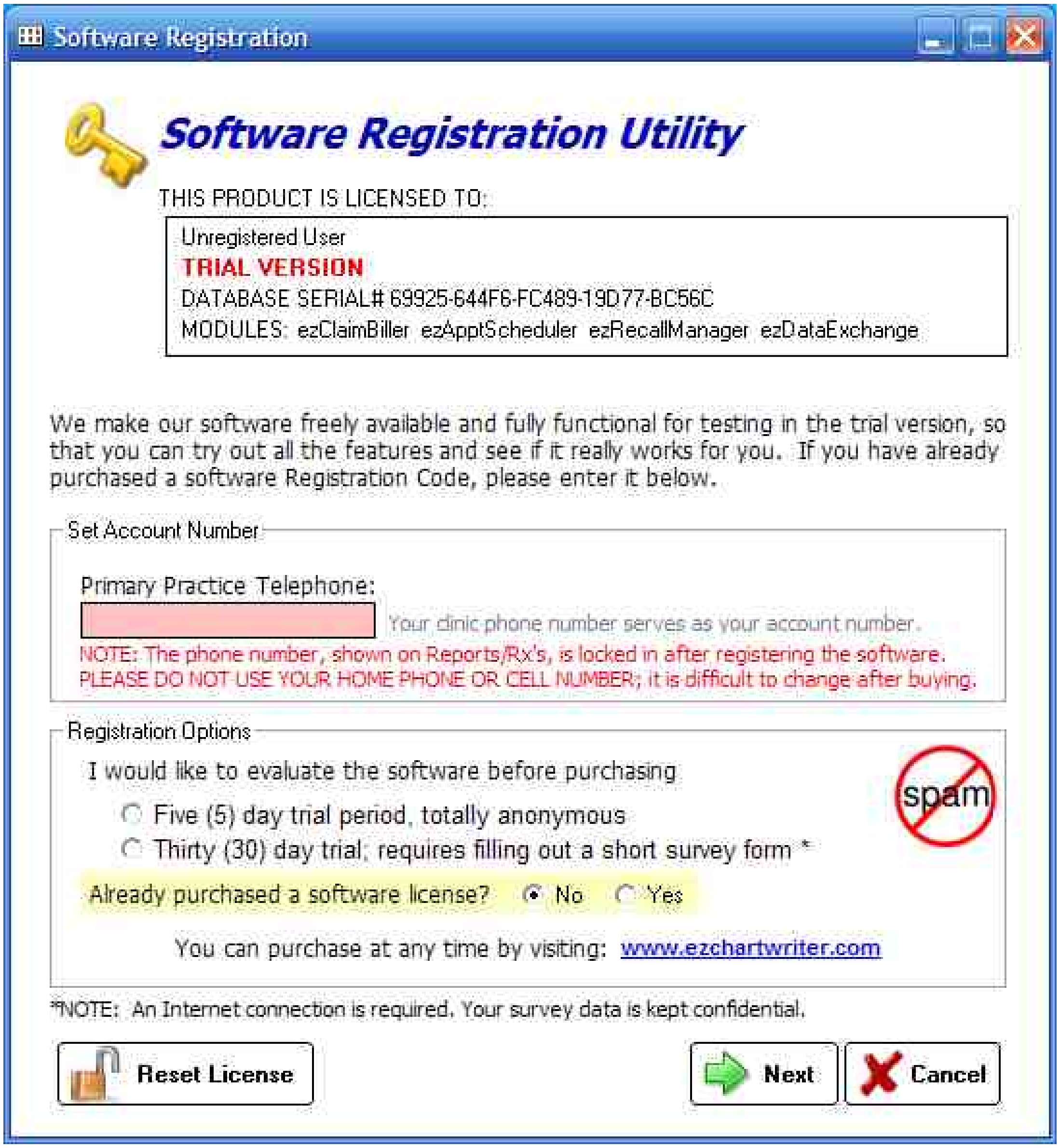
3. Select the **First time installation** option and select the **Edit Admin Settings** box. It is recommended that you use the default installation location (usually the **Program Files\ezHealthWare** folder, unless you are setting up a client computer on a network.

4. Click **Next**. The **Registration of Software** window displays momentarily, and then the **Create New Database Utility** window opens:



5. Click **Build New Database**. The system builds your database and displays a completion message once the database is created.

6. Click **Next**. The **Registration of Software** window displays:

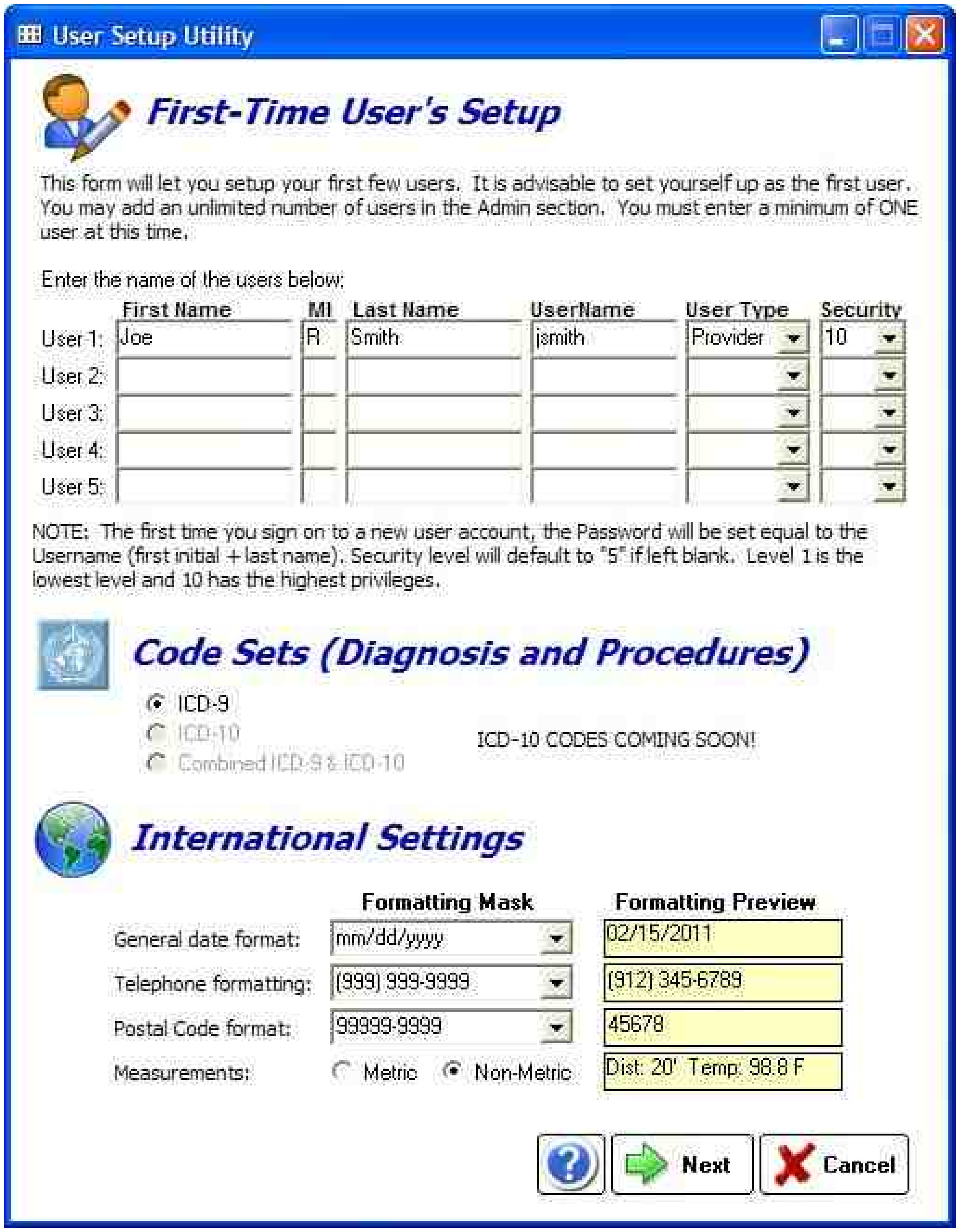


7. Once the database is created, you will be guided through the process of registering and setting up the software. If you are evaluating ezScriptWriter, you do not have to provide a software registration **key code** in the space provided. Simply leave this field blank and you will have an opportunity to use the software with a limited number of patients (30 is the maximum).

8. Click **Next**. The **Administrator Setup** screen displays:

IMPORTANT: The System Administrator is the software user delegated to maintain software settings and security levels, to add or delete users, and to register the software. This individual should be a trusted, long-term employee (preferably someone with good computer knowledge). The password that is selected must be remembered (unlike user passwords, it is not easily reset). Keep the System Administrator password in a secure location that is not easily accessible by others.

9. Click **Next**. The **Primary User Setup** window displays:



Enter your primary user information in the spaces provided. The system will automatically generate a username for you when once you enter your name. You can accept the username or create your own (your username must consist of at least five characters). If you have two users with the same last name and first initials, you will have to create a custom UserName for at least one of them (since the default username is first initial plus lastname)

International Settings - if you are using the software outside the United States you will likely need to adjust the date format and metric measurements.

10. Click **Next**. The **Password Information** window displays:

When you first log into the USER account, you will need to enter the default password. The default password for users is the same as the UserName (so for "jsmith", enter the password as "jsmith"). You will then be prompted to enter a new password.

11. Restart the software. You will see a notice that the Trial Period has begun.

12. Open ezScriptWriter and sign in to the Administrator account to review/set the security options.

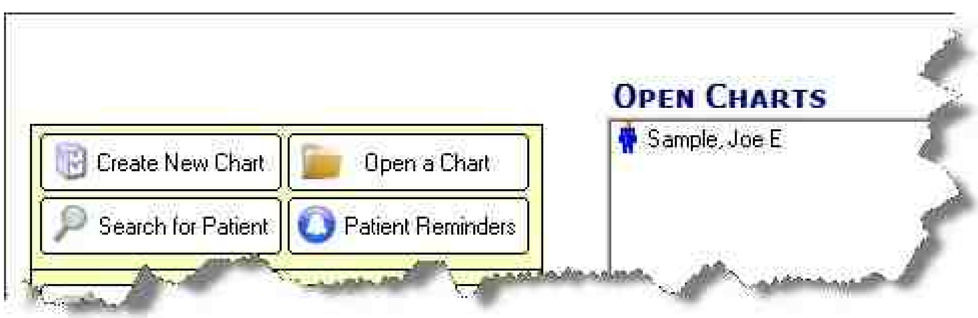
3.1.2 Password Selection

It is a good practice to choose a secure password. To often an easy-to-guess password is chosen, which defeats the whole purpose of passwords! A strong password would look like "r%i1L" or "sus99an1". A secure password should contain:

- No less than 6 characters
- Not be the same as your user name, personal name or birthday
- Does not sound like a dictionary word (e.g. "glove")
- Contains a combination of capital & lower case letters, numerical and/or special characters.

Having a simple password can leave you vulnerable to guessing or dictionary attacks, which can lead to unauthorized access to patient information. HIPAA regulations require that you make every attempt to secure your data. We recommend you use a password that has at a minimum eight characters and contains a combination of both letters and numbers. Passwords should be changed regularly.

3.2 Getting Started



How do I login as a User?
How do I login as a Administrator?

[How do I recover a lost password?]
[How do I access FAQ (frequent questions)?]
[How do I access the User Manual (pdf)?]
[How do I use the demo patient "Joe Sample"?]

3.2.1 User Login

When you come to the Main Menu of ezScriptWriter, you are automatically logged in. However, if you click the Logout button or are timed out due to inactivity, you will need to log back in before proceeding. You have three attempts to login before the software closes. The screen you will see will have buttons similar to those below:

After you click the User Login button, the following screen appears. You must enter your UserName (as setup by your Administrator) and password. You can change your password at any time by clicking the "Change Password" link. Click the Login button at the lower right to complete the login process.

3.2.2 Administrator Login

Once you have logged out as a user, you can re-log in as the Admin. Special features are available for the Admin, including the ability to create user accounts, set security levels and manage the software account.

WARNING: Be sure to Log Off of the Admin account when you have completed your work.

3.2.3 Lost/forgotten passwords

NOTE: The first time a user attempts to login, the default password is the same as the assigned UserName. After the first sign-in, the User must change the password.

Via User - Change Password

The User can change their own password after clicking the User Login button (only if they remember the password; if not, see below for details on resetting the password of a user).

Enter the old password then create and enter a new password. The software will not allow you to create a blank or single letter password. If you mis-enter the password(s), you will be prompted to try again.

Via Admin - Resetting a Forgotten User Password

First, you must sign in as the Admin. Then click the Reset Passwords button.

NOTE: When the password is reset, it becomes the same as the UserName. So user "jsmith" will have a password of "jsmith" which must be changed on the first login attempt.

Admin Password - Lost/Forgotten

The Admin password is set when you first setup the software. If you have forgotten it, you can reset by clicking the "Forgot Password" next to the Admin login button.

Change your password by entering the current password (you will be prompted to enter a new one). Or, if you have lost your password, enter the code provided by TechSupport to reset the Admin Password.

3.2.4 FAQ (frequently asked questions)

3.2.5 User Manual (pdf)

Click on the User Guide on the Main Screen to view the printed (pdf) version of the help manual.

3.2.6 Sample Patient

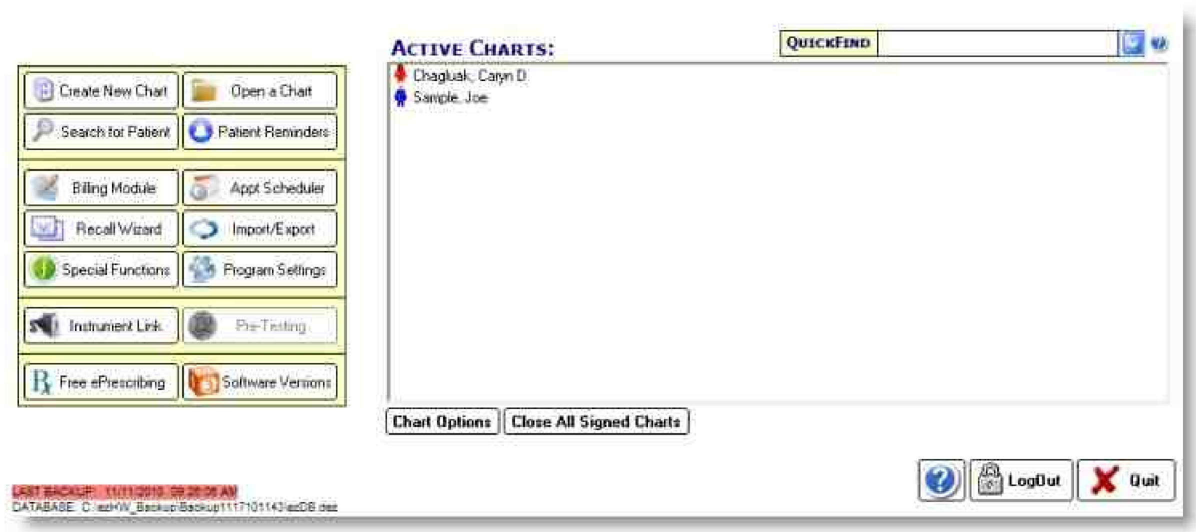
The software comes with a demo patient that you can use to create practice charts, reports, Rx's and such. You can also create your own sample patients, however we recommend that you use the default sample patient for these reasons:

1. "Joe Sample" is known to the software for being a demo patient, and all reports and charts are ignored when creating "real" reports.
2. The default sample patient can be closed even with open (unsigned) reports/Rx's. Normally you can't close patient charts if there are unsigned items.
3. Tech Support will have you test with this patient.

WARNING: Do not delete the Joe Sample patient! Simply close the file by right-clicking and selecting Close.

3.3 Navigating the Program

The Main Screen of the ezScriptWriter is divided into two primary sections: the left side section is the Button Menu and the right-side is the Open/Active Charts List. Much like in a paper-based office, charts can be created and "opened". When in "opened" status, they display in the Open Charts. To avoid confusion, the term "Charts" relates to the patient demographics and Encounters relate to an exam chart.



Open Charts Section

When you are doing work on a patient's Chart, it usually needs to be in "open" status. By double clicking on the patient name, you open the Encounter List for that patient.

Patient Status Icons:

Female Patient (red)
Male Patient (blue)
Gender not specified
Sticky Note present - click the patient name once to read or edit.

Right-Click Menu Options:

View Encounters - Opens the Encounter List
Edit Demographics - Opens the Patient Demographics
Modify Name - Allows a patient name to be changed.
Attach Document - Allows you to attach a document (or scan one directly to the chart)
Message Manager - Add a Sticky Note or Billing Note
Close & Refile Chart - Closes the chart; will disappear from Open Ledgers list

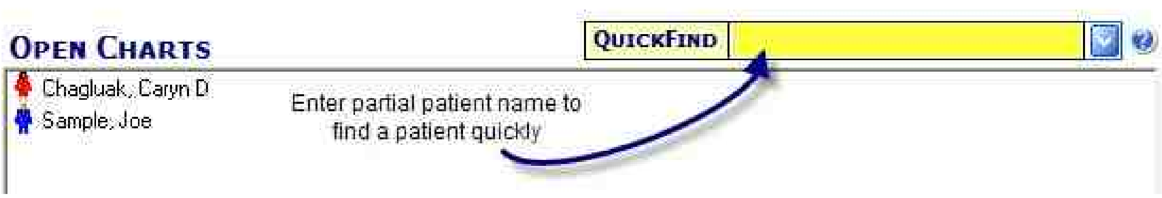
3.3.1 Main Menu

How do I ?

- Create a new patient chart?
- Open an existing chart?
- Search for a patient?
- View patient reminders?
- Use the Recall Wizard?
- Use the Special Functions?
- Customize program settings?
- Find out about ePrescribing?
- Import or export data?

3.3.2 QuickFind Tool

Using the Q-Link Tool, you may enter some, or all, of a patient's name to quickly pull up their chart. You may use just a single letter of either the first or last name, or as many as you wish. The more letters you enter, the more unique your search results. You may also us the wildcard character "*" to indicate that you do not know the letter. Just press the Enter Key to quickly start the search.



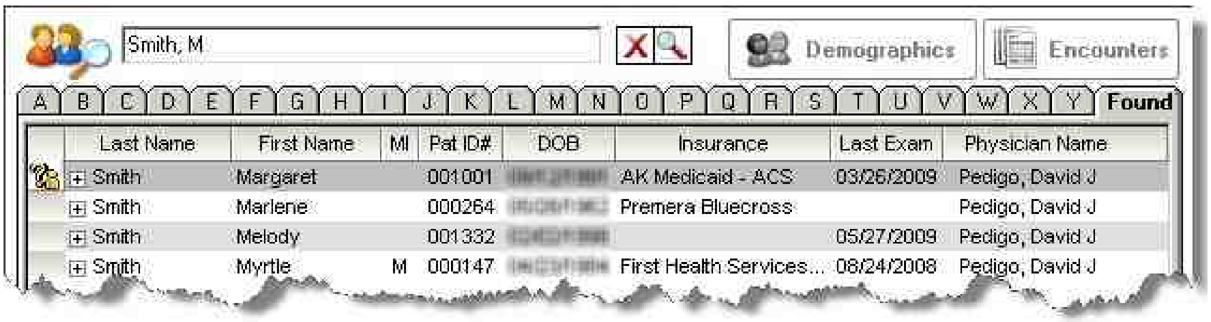
If you wish to search by Chart Number, simply enter the number you are searching for and the matching patient will be displayed.

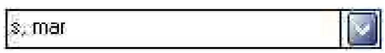
Examples

Imagine we are trying to quickly pull up Margaret Smith, while trying to type the minimum number of letters. We could try it each of the following ways. The best method is to enter two letters of both first and last name.

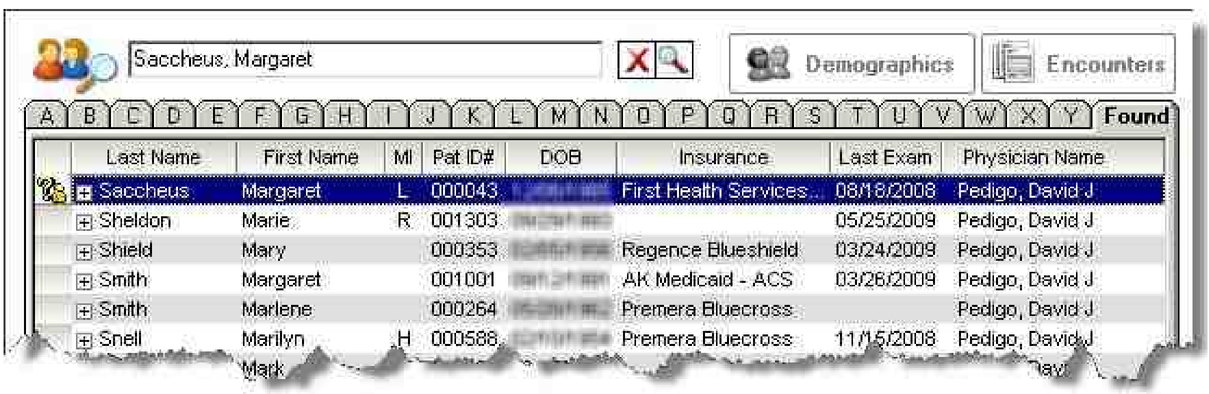
Typing: 

Would find the following:



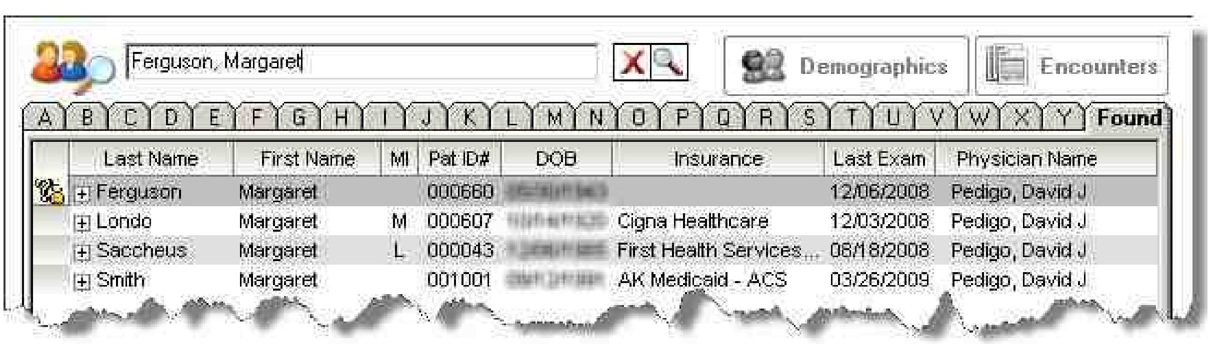
Typing: 

Would find the following:

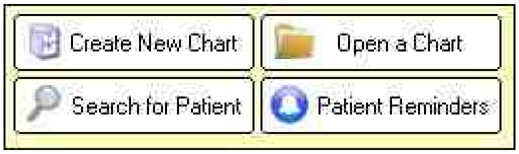


Typing: 

Would find the following:



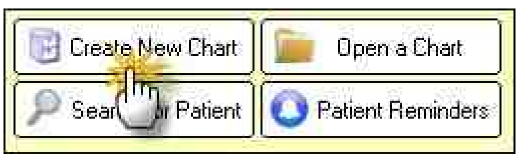
3.3.3 Patient Charts



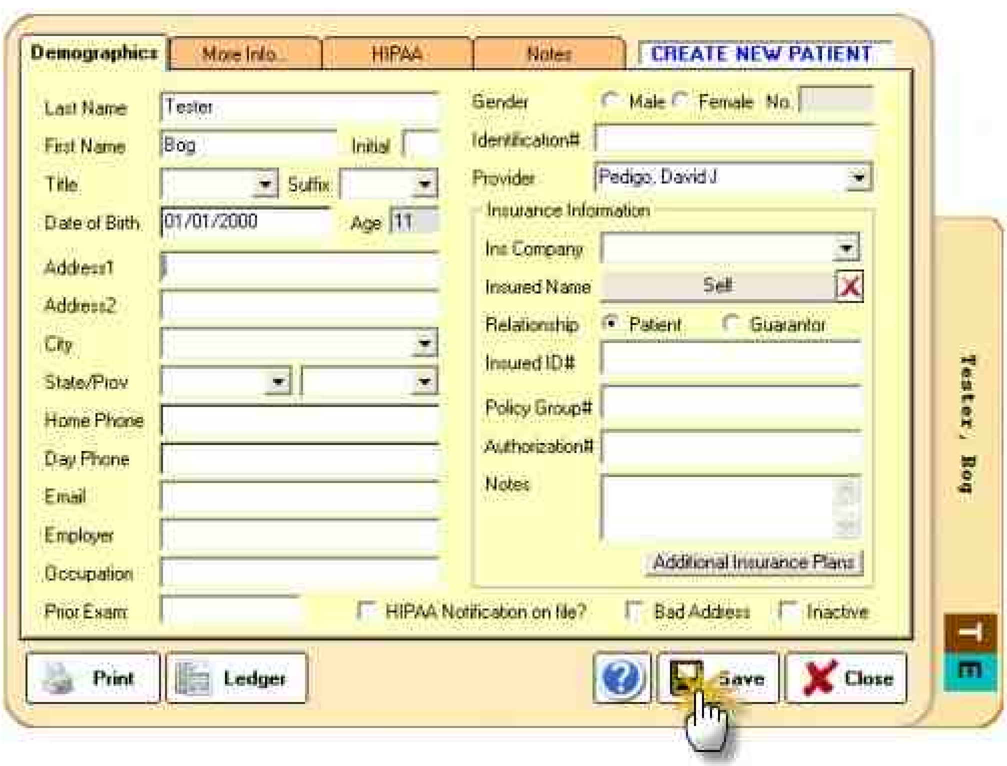
How do I create a new patient chart?
How do I find and open an existing patient chart?

3.3.3.1 Create a New Patient Chart

1. Click the New Patient button



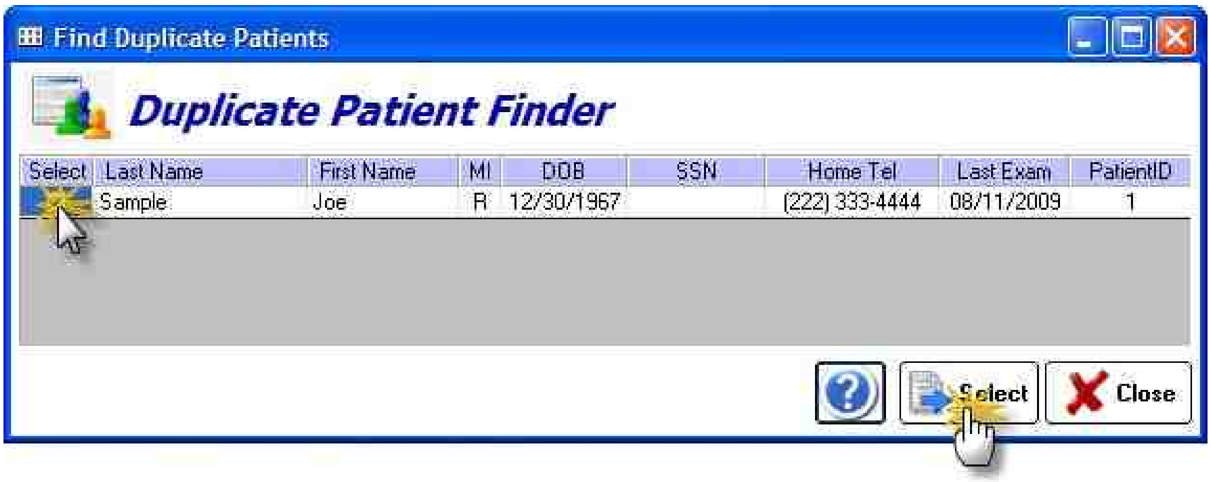
2. Enter the patient demographics. Note that only the first name, last name and date of birth are required to create the chart.



3. Click the Save button to create the new chart.

Duplicate Patients

If a patient already exists in the system, you will see the Duplicate Patient screen after you enter the name and date of birth. If a patient matches, click the checkbox next to the name and click the Select button to open that patient's chart. Otherwise, click Close and continue entering patient demographics.

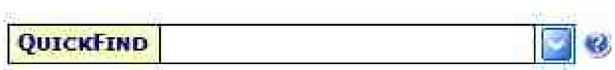


3.3.3.2 Open an Existing Patient Chart

There are two methods to open an existing patient chart:

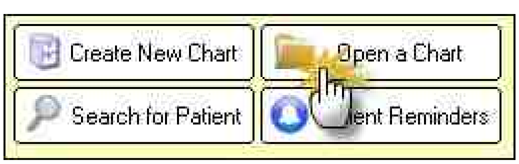
Method 1 - QuickFind Tool

This is the preferred method for quickly finding a patient. Using the **QuickFind** field, you simply need to enter a few letters of the patient name and press **Enter**. The list of matching patients is displayed in the **Patient Listing**.

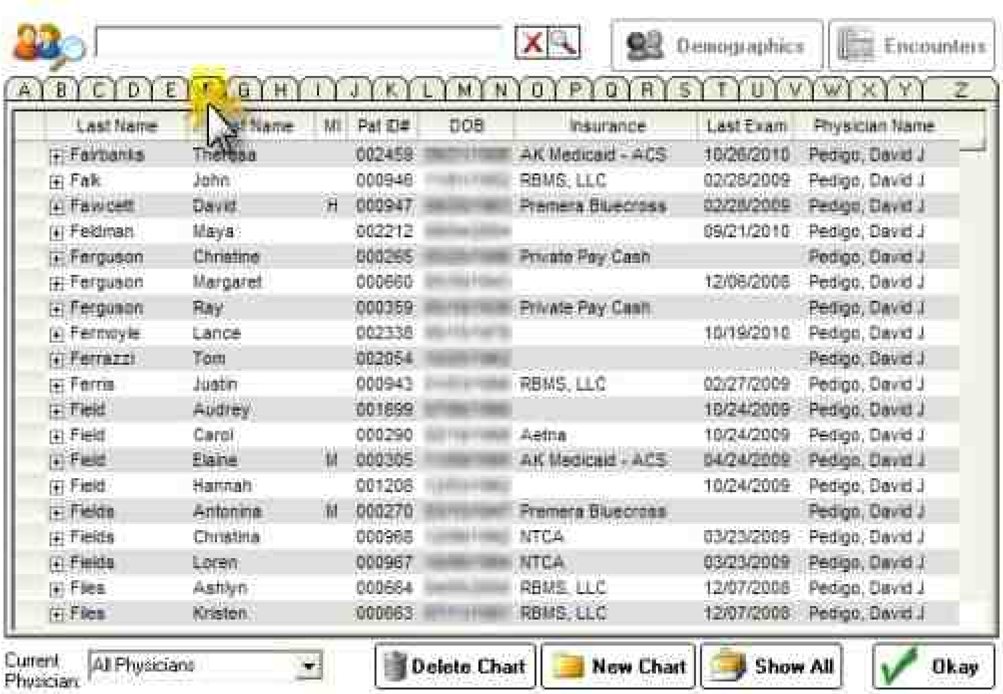


Method 2 - Patient Listing

This method allows you to view complete lists of you patients, arranged in alphabetical order. When in Patient Listing view there are additional features available by right-clicking the patient name.

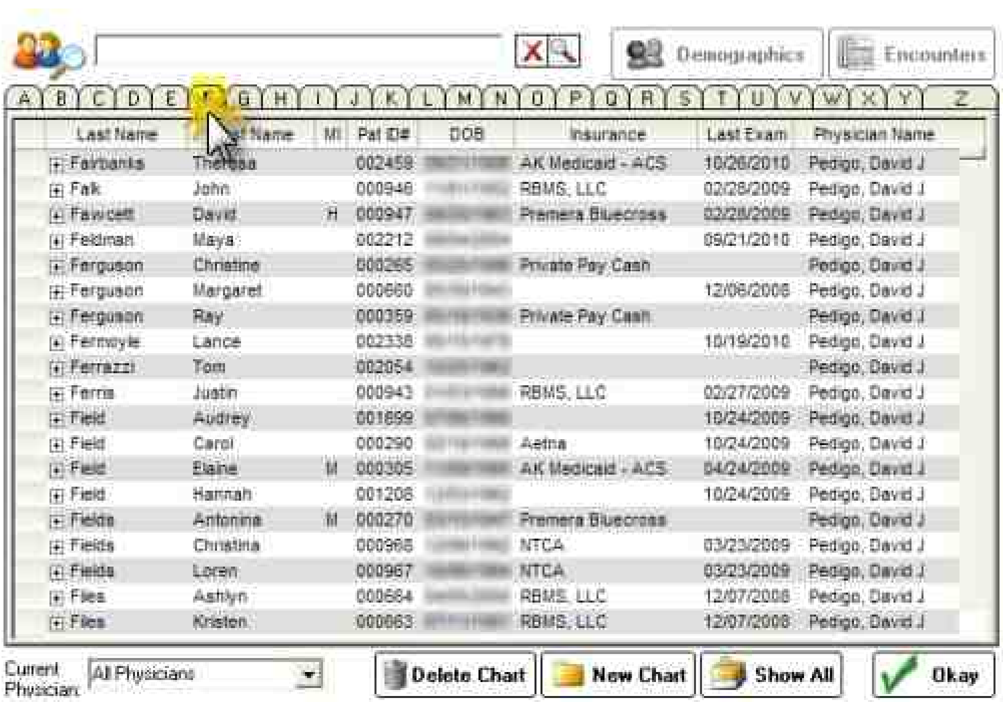


To find a patient, click on the Letter tab at the top and scroll down. You may double-click the patient name to directly open to the Demographics screen. You may also enter the name in the Search Box at the top of the Patient Listing.

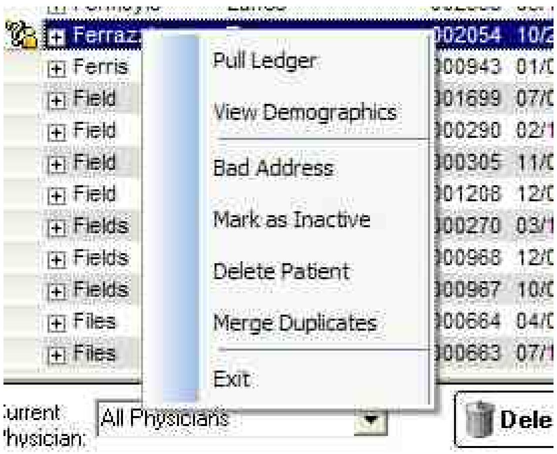


3.3.3.3 Patient List

The Patient Listing is the main dashboard for working with patient's demographic charts. You enter the Patient Listing by either using the QuickFind tool or the Find Existing button.



Double clicking on a patient name opens the demographic screen. Right-clicking a patient name opens up the additional features menu. Note that you MUST have the patient name highlighted for the menu to open.



Pull Ledger

This option pulls the chart and adds to the **Open Ledgers** screen. It does not display the Demographics screen. This is useful if you need to pull multiple patients.

View Demographics

Opens directly to the patients demographic screen (equivalent to double-clicking the patient name in the **Patient Listing**).

Bad Address

Allows you to mark the patient as having a "bad address", without having to open the demographics screen.

Mark as Inactive

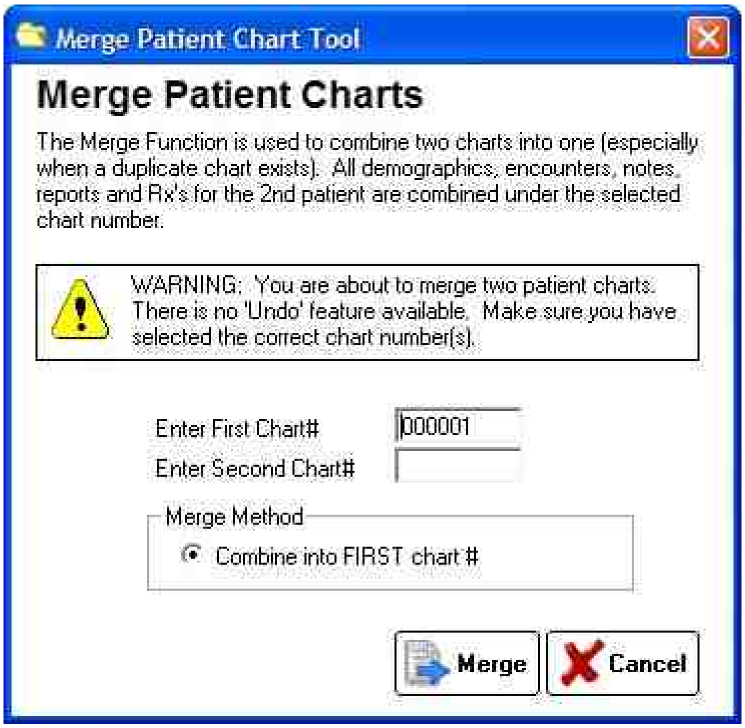
Allows you to mark the patient as "inactive", without having to open the demographics screen.

Delete Patient

Allows you to delete the patient chart. Note this requires you to have sufficient Security Level to perform this action. The Admin function in the Main Module allows for security settings to be adjusted.

Merge Duplicates

If you accidentally create two charts on the same patient (for instance because of a name change), you can merge the data together. The merge function keeps the demographics of the "First" patient (which you select by chart number) and merges all documents and reports under that first patient ID. There is no undo function, so use this function with care.



Exit

Leaves the menu without change.

Button Bar

The Button Bar at the bottom of the Patient Listing allows a few additional features.

Select Current Physician

If you wish to display only charts for a selected physician, use the dropdown box to choose the physician. The default is to show all physicians.

Delete Chart

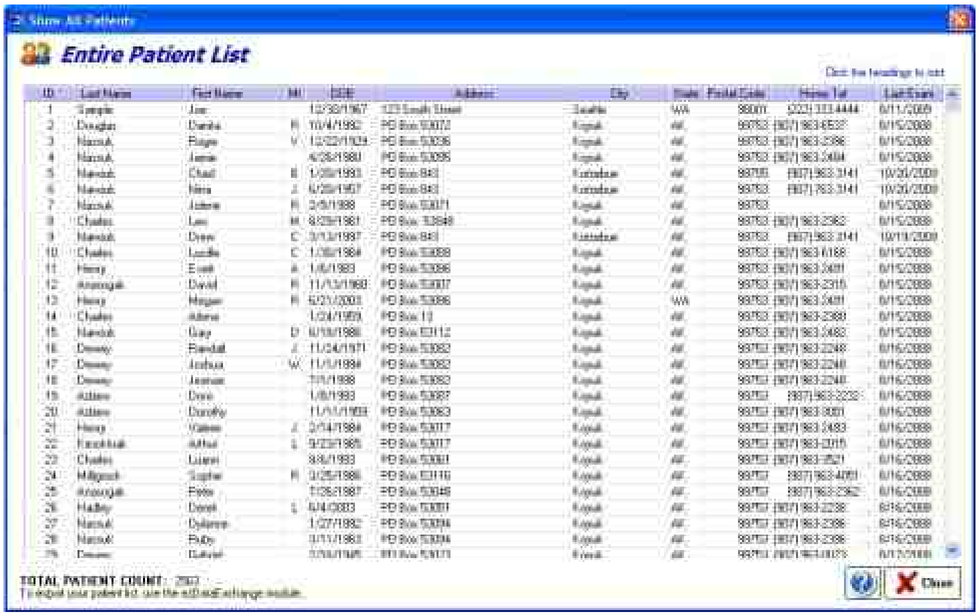
Allows you to delete the patient chart. Note this requires you to have sufficient Security Level to perform this action. The Admin function in the Main Module allows for security settings to be adjusted.

New Chart

Same function as clicking Create New Patient button.

Show All

All patients in the database are shown in a single list. Note: This may take a long time to run, if you have a large number of patients (in excess of 20-30K). The actual patient list can be exported using the Import/Export feature in the Main Module.

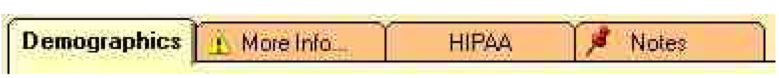


3.3.3.4 Patient Demographics Screen

The Patient Demographics screen is the primary location of all patient contact information, as well as insurance and billing details.

The Demographic screen has four primary tabs and a lower button bar:

Basic Demographics

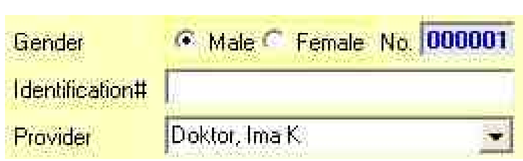


Last Name - required (apostrophe's are allowed; minimum 1 character)
First Name - required
Middle Initial - optional (can enter multiple characters)
NOTE: You can enter the name in all lowercase for speed; it will be converted automatically.
Title - the patient's salutation
Suffix - generational suffixes such as Jr, Sr, III
Date of Birth (DOB) - highly recommended. Can enter just 2-digit year, but day/month require 2-digits.
Address block - you can customize the city/state/zip list under Settings in the Main Module.

NOTE: If you have entered the Guarantor/Subscriber for this patient already, you can use the blue arrow to pull the Guarantor's data forward

Home Phone - primary telephone at home (Note that there is no cellphone field; use the Custom Fields)
Day Phone - typically the work phone number; can be used for cellphone also
Email - patient's email; will automatically check for correct formatting.
Employer - will display on the Insurance Claim form
Occupation -
Prior Exam - date of last encounter with patient

Gender - recommended. if not selected, you will be prompted on saving chart
Chart No. - created automatically and cannot be edited or changed.
Identification # - previously for Social Security number; can be used for any ID you wish.
Provider - the patients provider (in your office)



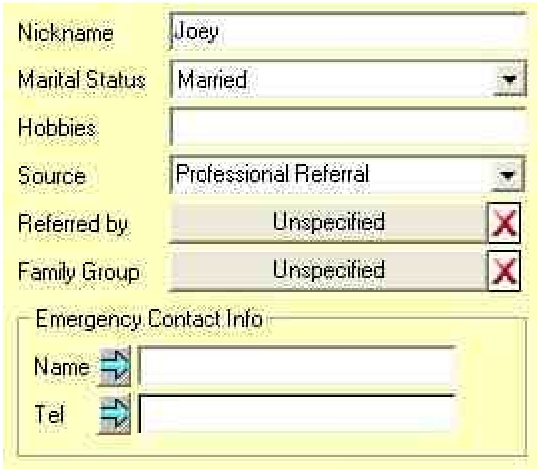
Insurance Company - select from list (you can add new companies in the Settings)
Insured Name - same as the Subscriber or Guarantor (e.g. who holds the policy)
Relationship - how is the Subscriber related to the patient (self or guarantor)
Insured ID - the insurance plan ID
Policy Group # - if the insurance plan has a group number, enter it here

Authorization # - if the insurance plan requires pre-approval and gives an authorization number
Notes - do not display on Claim Form; for your own internal use
Additional Insurance Plans - click the button to add or view additional plans (only for 2nd or additional)

HIPAA Notification status - allows you to indicate that patient has read/understood HIPAA requirements
Bad Address - if mail is returned and you wish to remove patient from mailing/recall lists
Inactive - if patient leaves the practice for some reason (charts will still be available for viewing)

More Information

Nickname - an alternate preferred name by the patient
Marital Status - will display on the Insurance Claim form
Hobbies - useful to track patient activities to assist provider rapport
Source - what got the patient into your office
Referred by - who, if anyone, got the patient into your office
Family Group - if a patient is part of a family, you can indicate it here
Emergency Contact - a person to contact if a medical emergency occurs in office.



Race/Ethnicity - hold the mouse over the letters to see what abbreviations indicate.
Patient Picture - if you wish to have an image of the patient you need to: (1) take picture with a digital camera or camcorder, (2) save the image to a shared network folder or similar, and (3) click the Set button to find and display the image. Click Clear to reset to blank image. NOTE: Patient photos display in the Main Module when you click the patient name once.

Custom Fields - up to six custom fields can be created for inclusion in the patient demographics. Once you create a field name, it CANNOT be altered. This is to prevent data mixing (e.g. you create a field called 'email' then want to change it to 'cell phone', but the original data remains). If you wish to change a field you can only create a new one (and stop using the old one). Custom Fields can contain nearly any data. Examples can include: Cell Phone, Facebook ID, Nursing Home Facility, Prior Chart #, etc.

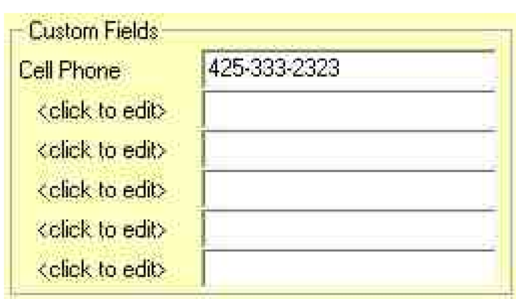
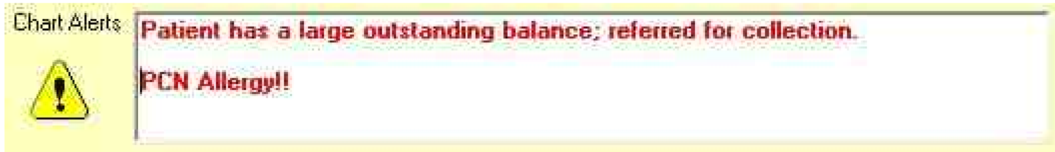


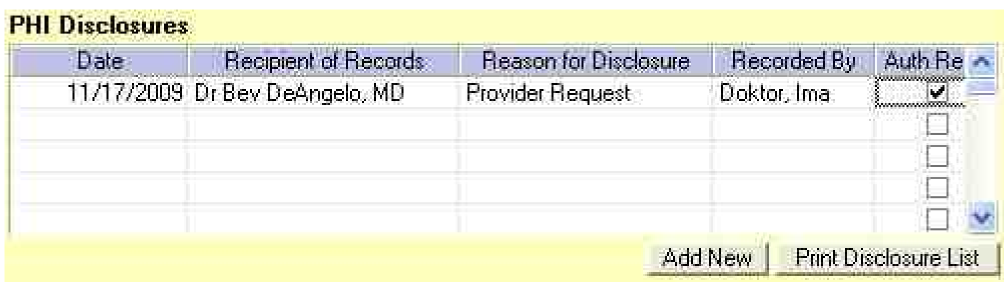
Chart Alerts - for important chart information that you wish to flag. The Alert icon will display at the top tab when you open the Patient Demographics, alerting you to the existence of a note. The Chart Alerts can be of any nature, but typically are special circumstances such as allergy notifications or collection accounts.



HIPAA Information

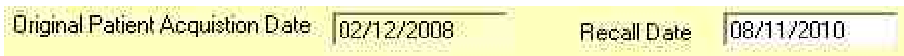
Notification of Privacy Policy - checking the HIPAA box on first Demographics screen auto checks these two boxes.

PHI Disclosures - Patient Health Information disclosures can be tracked on this screen. Each time the patient or an outside entity sends a record request, you should use the "Add New" button to record the event. You can print the Disclosure list when/if a patient requests to know who has requested PHI. Be sure to click Save on the Patient Demographics screen to finalize the data.

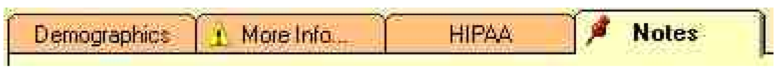


Privacy Requests - any specific privacy requests can be noted here

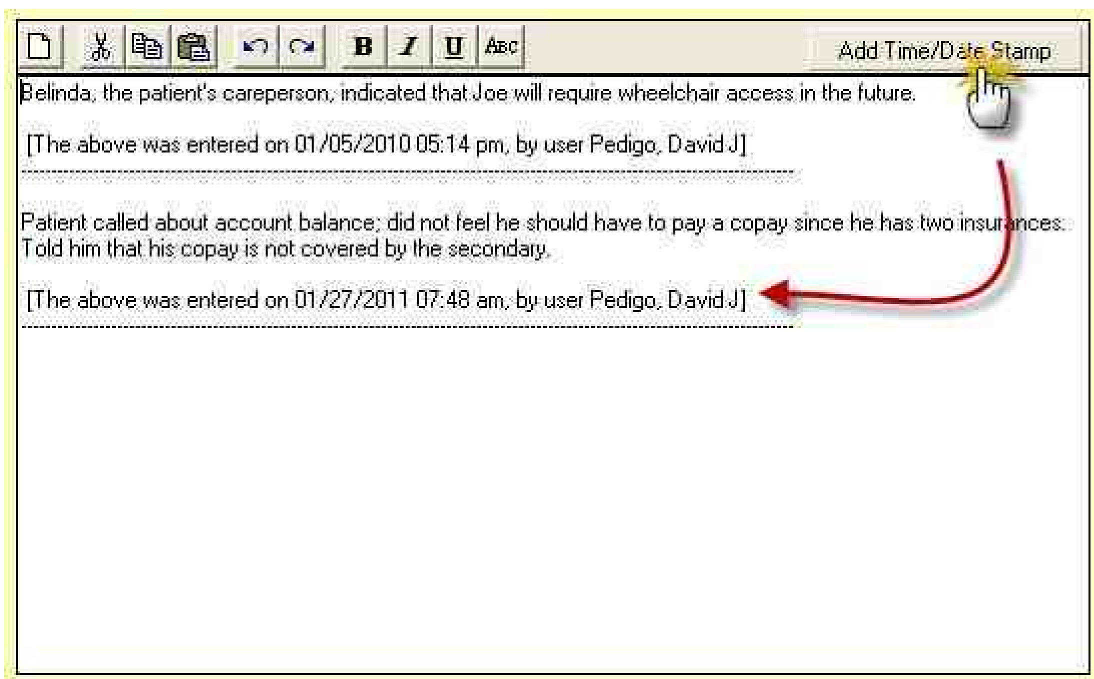
Acquisition Date - the original date the patient was entered into the database (or otherwise acquired by the practice.
Recall Date - the date the patient is scheduled for recall visit.



Patient Notes



Free Text Notes - any sort of billing or personal notes can be entered in this section. It is NOT for clinical notes (it is not printed as part of the chart). The "Time/Date Stamp" will automatically add a separator after you enter the note with current date/time information.



Lower Button Bar

Customize Button - allows customization of lists/dropboxes (e.g. city, state, postal codes)

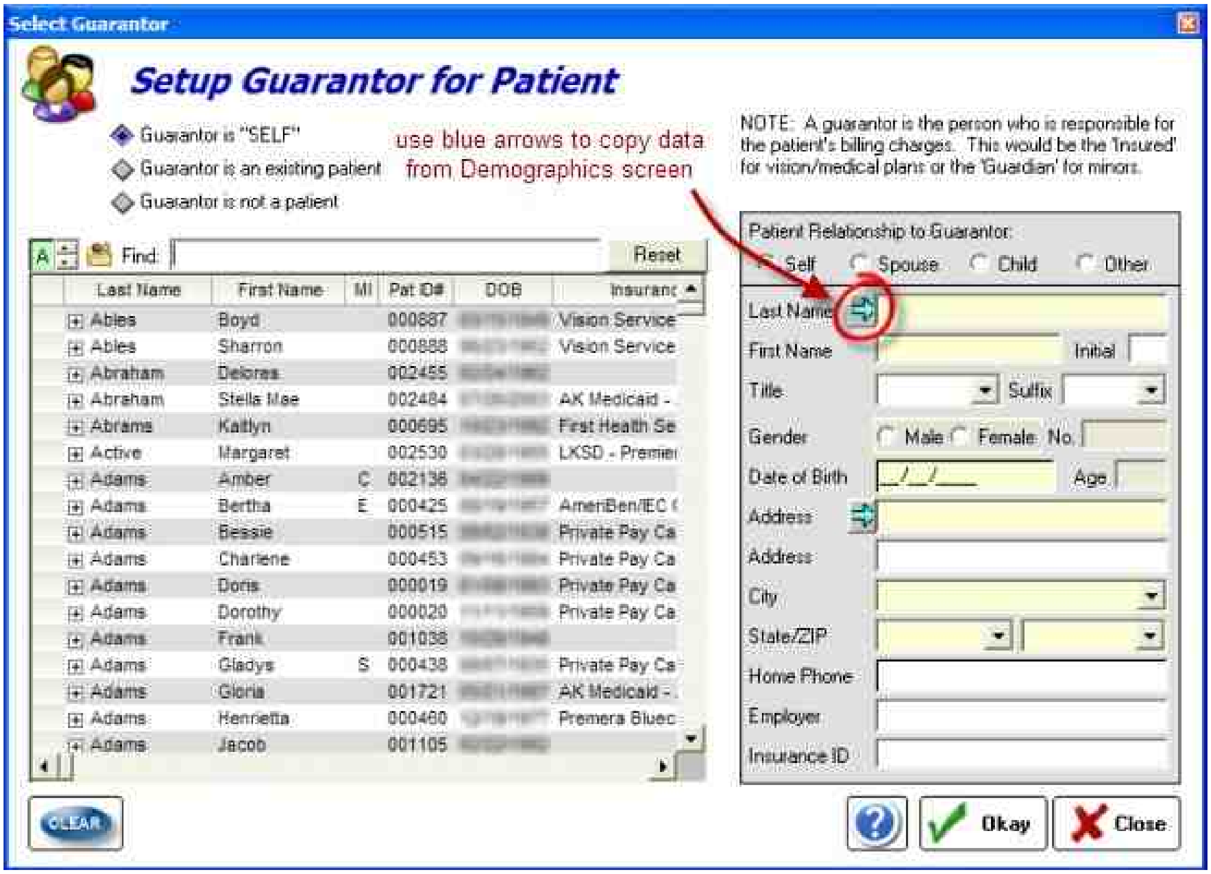
Print Button - prints either a Demographic Summary page or address label (on DYMO printer only)

Encounters Button - switches to Encounters view
Save Button - used after any changes are made to the demographic record. Also used to pull a chart when displayed in the Patient List into the Open Charts screen.
Balance Notice - if the patient has a balance due in ezClaimBiller, a red notification bar will display

3.3.3.5 Subscriber Info

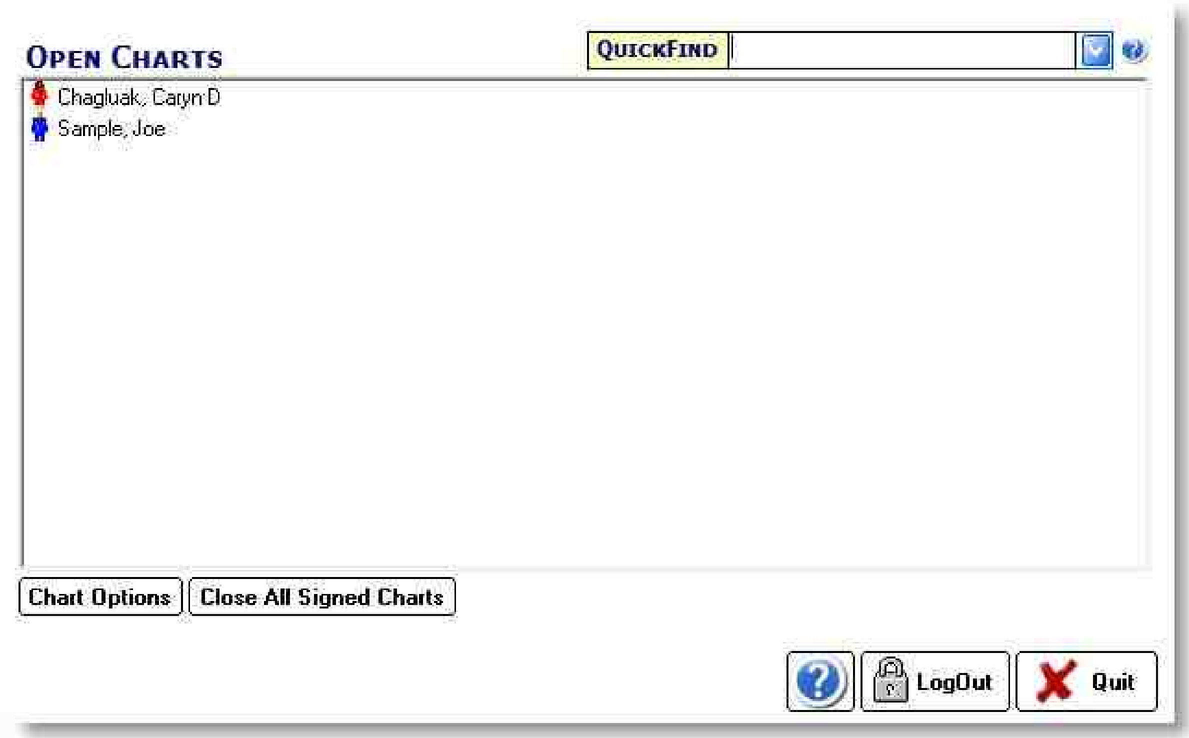
In order to bill a patient's insurance plan, you will need to enter the Subscriber info. This screen can also be used to enter the Guarantor info for a minor patient (e.g. the parent or guardian). To open, click the Subscriber button in the Insurance Information section. NOTE: To clear a subscriber, click the red delete button.

The Guarantor/Subscriber screen will open. The default type is "self", but you can enter either an existing patient (by selecting from the displayed patient list) or enter a new guarantor/subscriber. Use the blue arrows to transfer information (such as same last name or address). Be sure to select the appropriate "Relationship to Guarantor".



3.3.3.6 Open/Pulled Charts

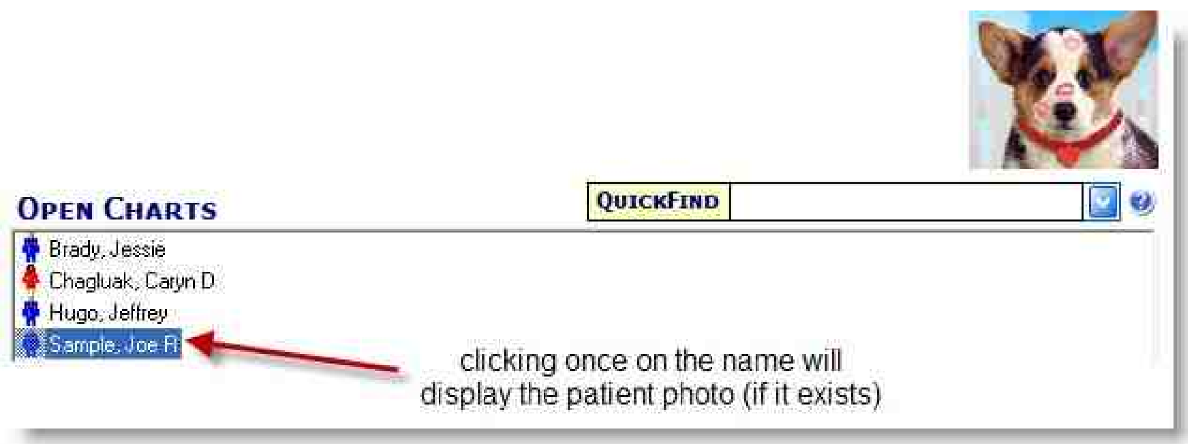
The very first screen you see upon signing in is the Open Charts screen. Much like a chart pulled from a real file cabinet, Open Charts are available for viewing and creating items (encounters, Rx's, reports, etc). When you are done with a chart, it is "closed" and removed from the Open Charts screen. You close a chart by right-clicking the name and selecting "Close Chart". You can only close a chart that has all encounters, reports and notes finalized (except for the Sample Patient, which does allow immediate closing).



To use the Open/Pulled Chart, simply right-click the name to get a list of Chart Options or double-click to be immediately taken to the Encounter List.

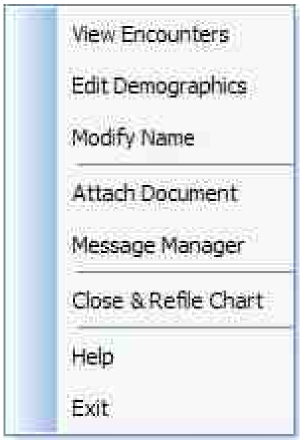
Patient Photo's

If a patient has a photo entered in the demographics screen, click the name ONCE to view the image.



3.3.3.7 Chart Options

Right-click a patient name in the Pulled/Active Charts list to pull up the options menu.

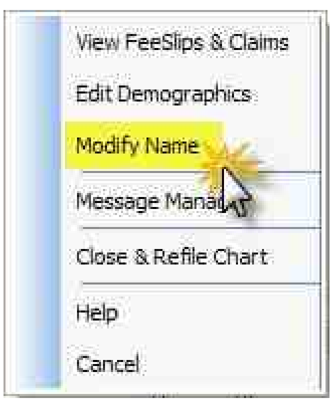


How do I view Encounters?
How do I edit Patient demographics?
How do I modify a patient name?
How do I attach a document to the chart?
How do I create a message or note?
How do I close/refile the chart?

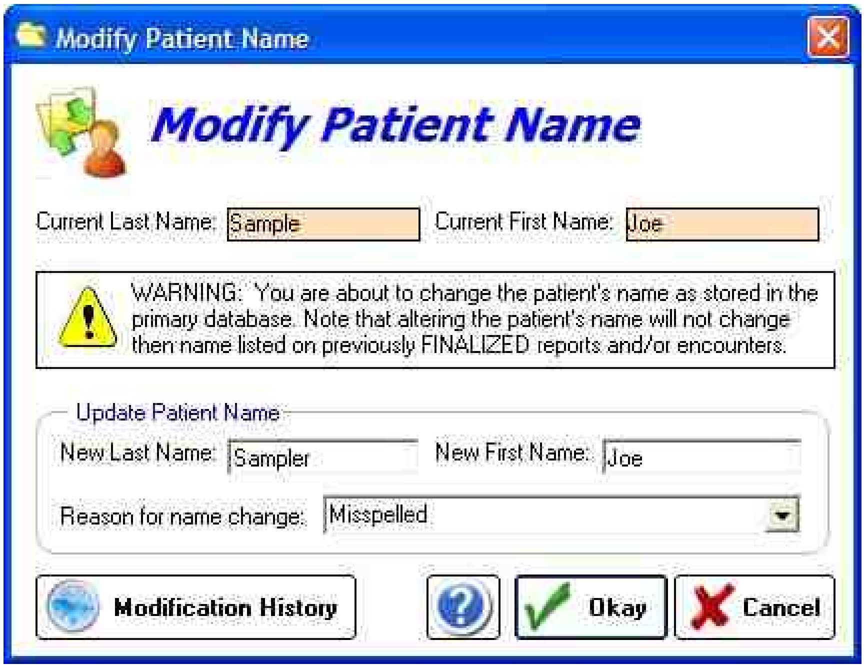
3.3.3.8 Modify Name

Patient names (once the chart is created) can only be modified with this tool. This is done to both track name changes/reasons and to prevent data loss.

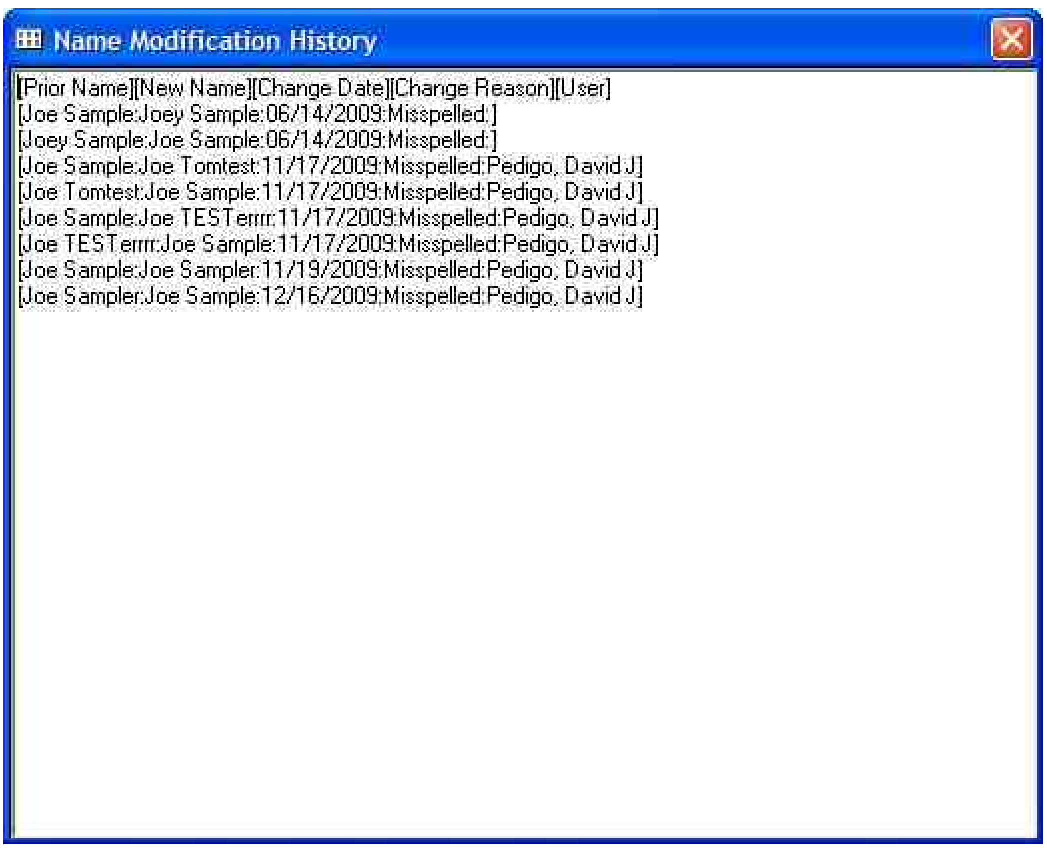
Right-click the patient name in the Open Ledgers view and select Modify Name.



The Modify Patient Name screen will show and you can enter the corrected name in the boxes at the bottom. Indicate a reason for the change and click okay.

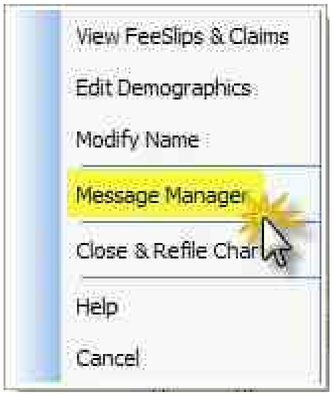


You can also view the history of name changes by clicking the Modification History button.

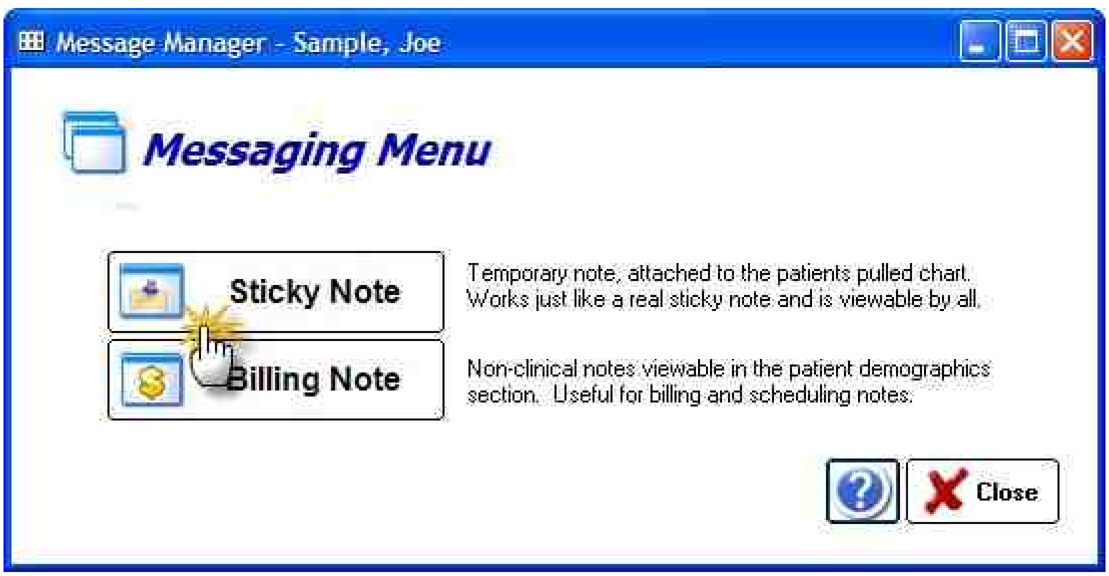


3.3.3.9 Sticky Note

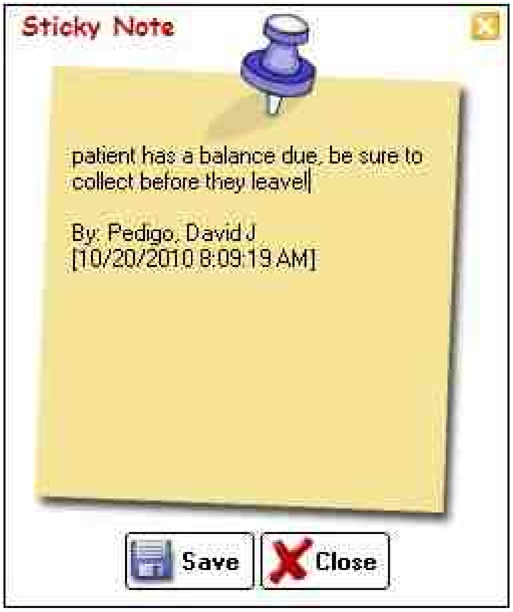
You can add short "Sticky Notes" to a Open Ledger by right-clicking and selecting the Message Manager option.



Once the Message Manager appears, select the Sticky Note button.



The Sticky Note edit screen will appear and you can enter any text you wish. Once you save the note a date/timestamp will append (with the user's name).

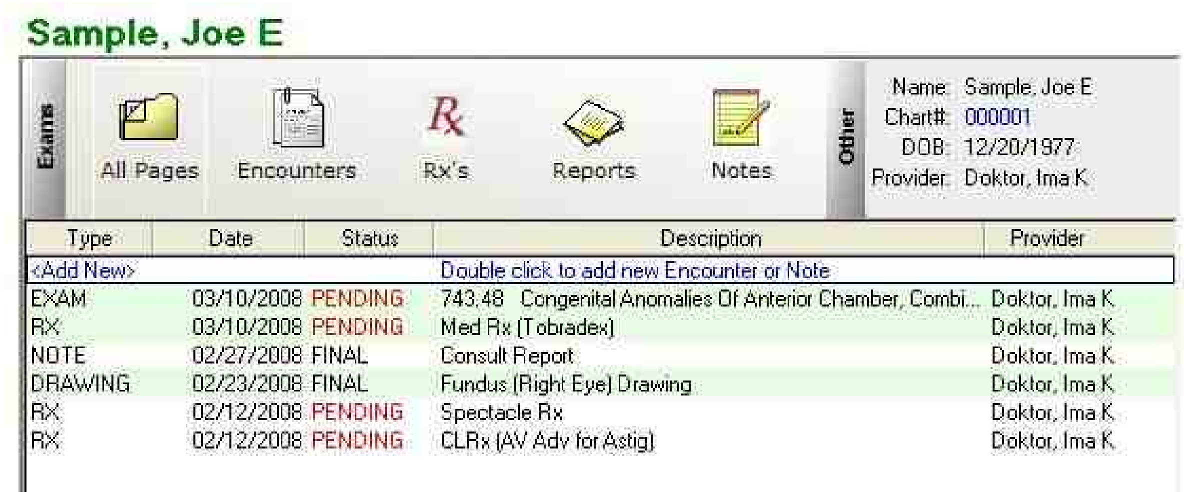


To View a Sticky Note:

If a patient has a Note icon, simply click ONCE on the patient name to view it. You can also edit or delete the note, or click the View FeeSlips/Claims button to open the Encounter List.

3.3.4 Encounter List

The "Encounter List" is the main dashboard for viewing patient encounters (including Reports, Rx's and scanned/attached documents). You generally arrive at this screen by double-clicking the patient name, although you could also click the Encounters button on the Patient Demographics screen.



There are several tabs across the top of the Encounter Screen to help you navigate to the correct item. You can double-click the <Add New> at the top of any list to add a new item.

Exams

All Pages

Shows all the items from every category

Encounters

If you are using the full EMR version, you will see a list of pending and finalized exam encounters. The first CPT assessment code will be displayed in the description field.

Rx's

The list of generated Rx's for a patient (that have been printed/saved). The full list of every Rx (even if not printed) will be shown by clicking the Logbook button.

Reports

The list of generated reports for a patient (that have been printed/saved).

Notes

If you have entered any notes on the patient they will display here.

Other

Drawings

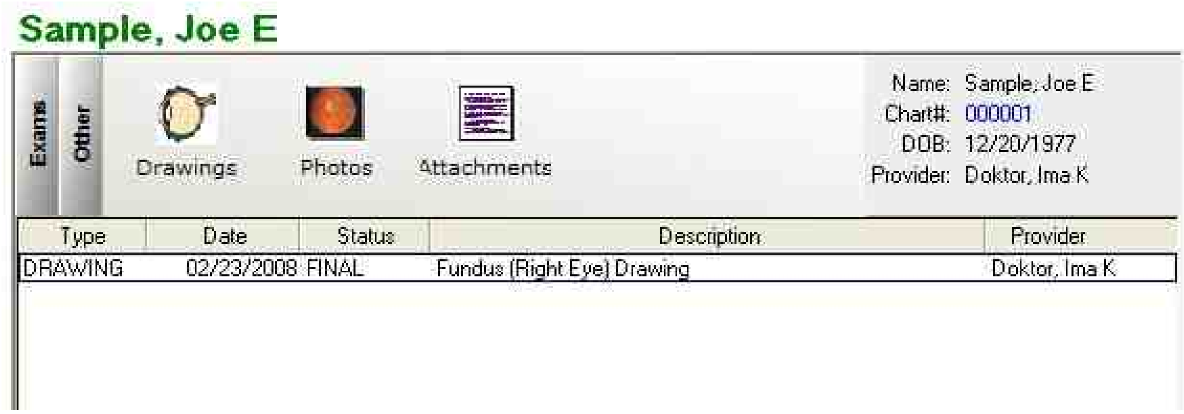
If you are using the full EMR version, you will see a list of pending and finalized exam drawings. By double-clicking an image you will see the Image Manager display.

Photos

Not currently used in this version.

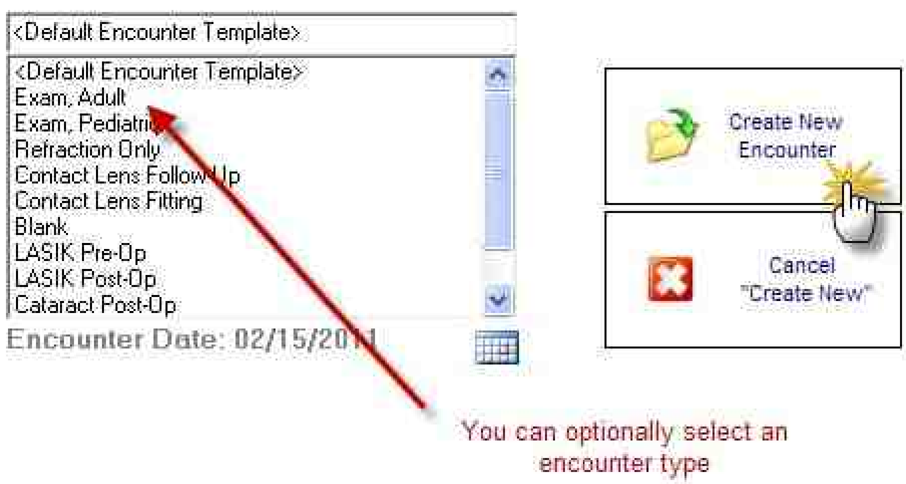
Attachments

The list of scanned or attached documents for a patient. If you double-click an item, the document will open in native format (e.g. pdf documents open in Adobe, doc in MS Word) if you have the software installed on your computer. You can download the free Adobe Reader software directly from their website: http://get.adobe.com/reader/



3.3.4.1 Create Encounter

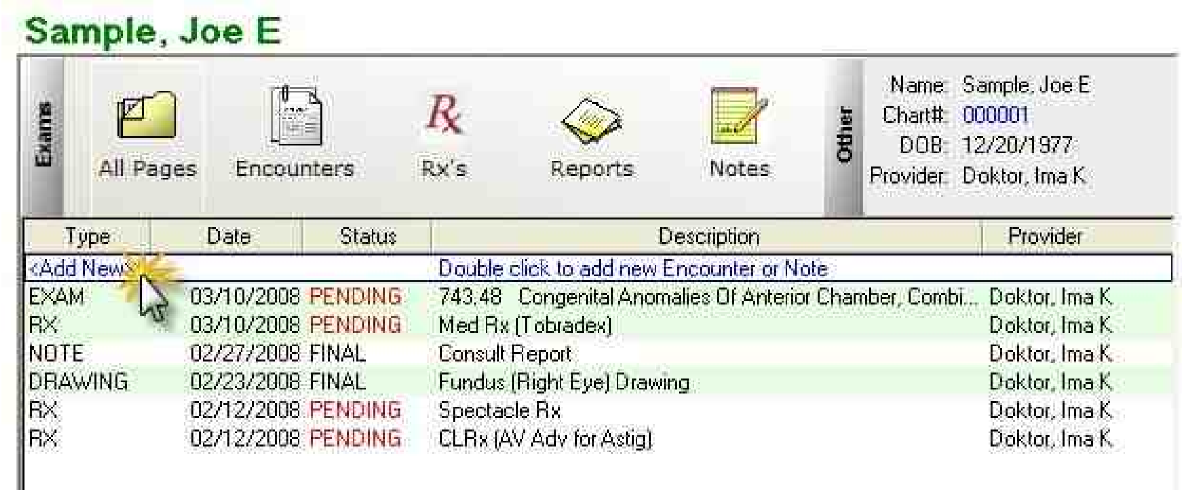
A new Exam Encounter can be created by clicking the Create New Encounter button. The default date will be Today and the default Encounter Template will be used if none is selected.



Click the Help button within the Exam Encounter screens to get more help once you have a new encounter open.

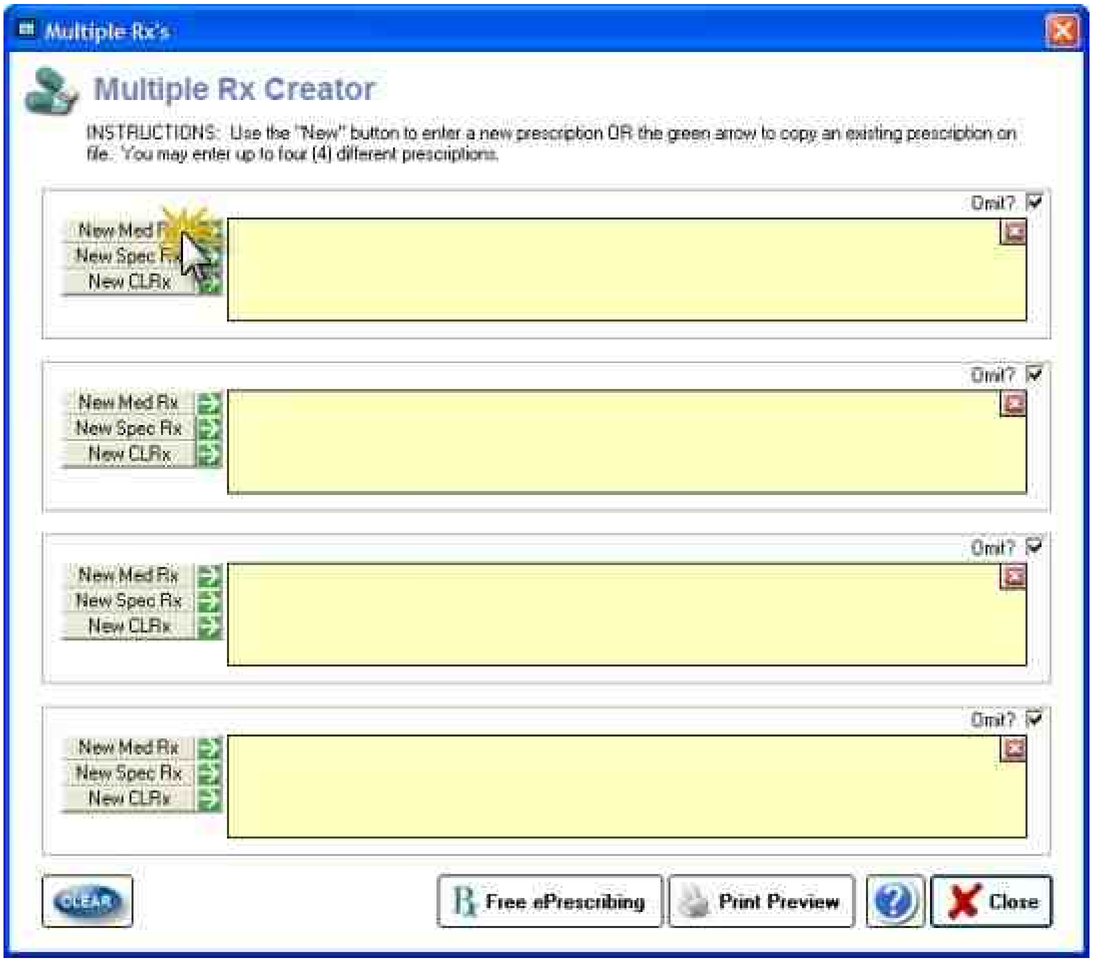
3.3.4.2 Create Rx

To create a new Rx, open the Encounter List by double-clicking the patient name. Then click the <Add New> line at the top of the list:



The Choose Type of Item screen will appear. Click the "Create a new Rx" button.

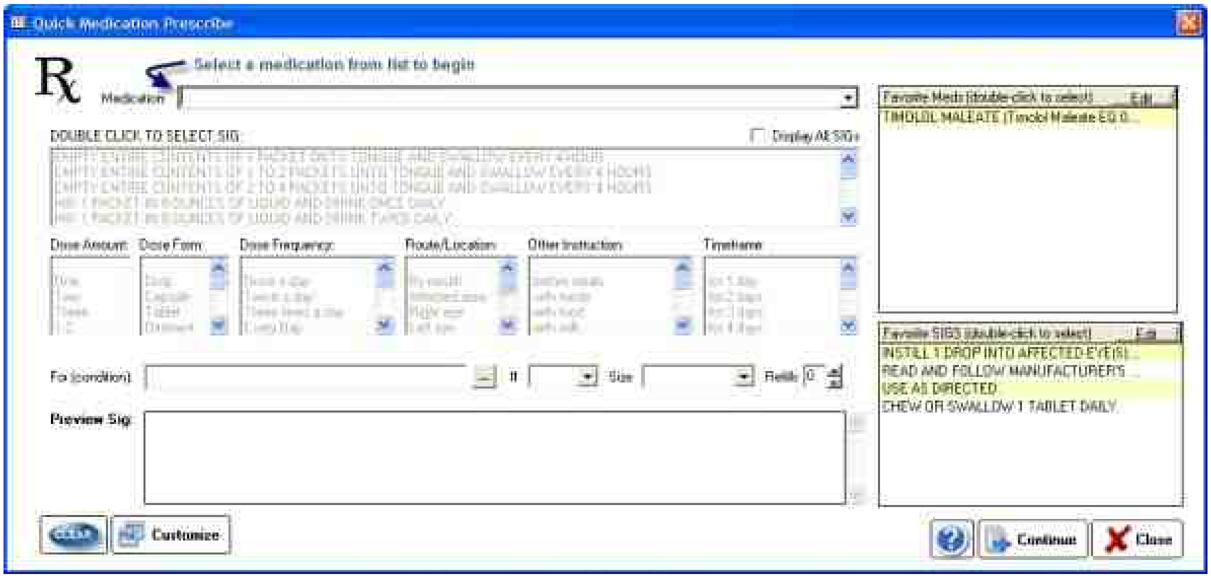
The Multiple Rx Creator tool will display. With this tool you can add up to 4 new Rx's at a time. To begin with a brand new Rx, click one of the "New" buttons on the topmost Rx box:



NOTE: If you have already entered a prescription that you wish to re-use, the click the green arrow button to call up the LogBook so you can import the Rx. You will be prompted to save Rx's to the LogBook when closing the Multiple Rx Tool.

Medication Rx

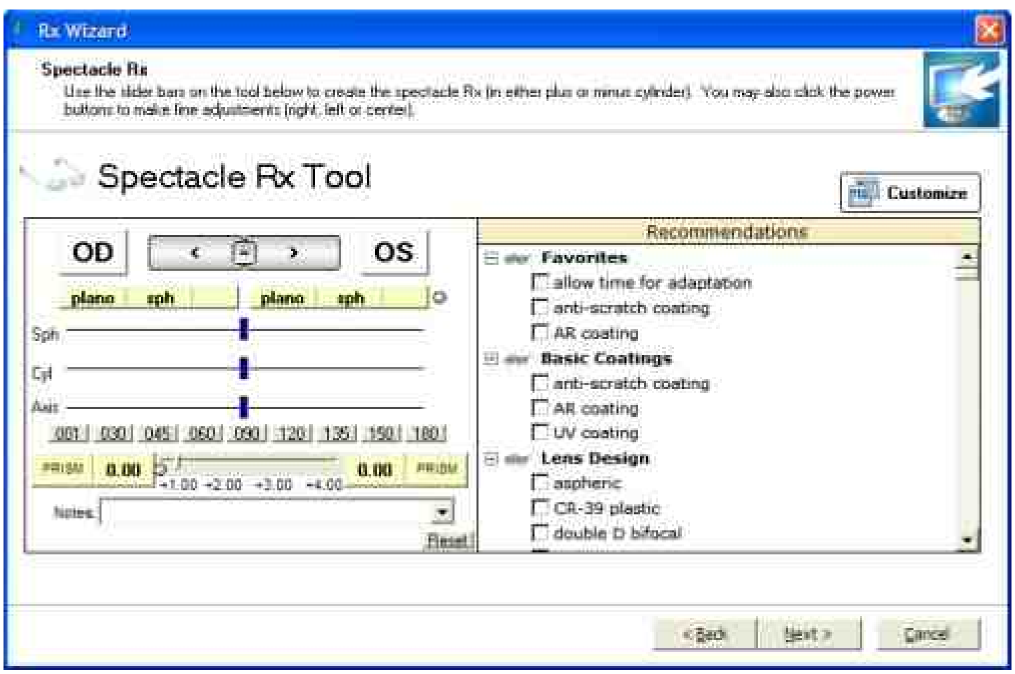
The New Med Rx button will display the Quick Medication Prescribe screen. To begin you must select a medication from the top dropdown screen (or choose one from your Favorite Meds list):



Enter your Sig by using the list choices or use your Favorite Sig. Verify the data in the Preview Box and then click **Continue** to add to the Multiple Rx list.

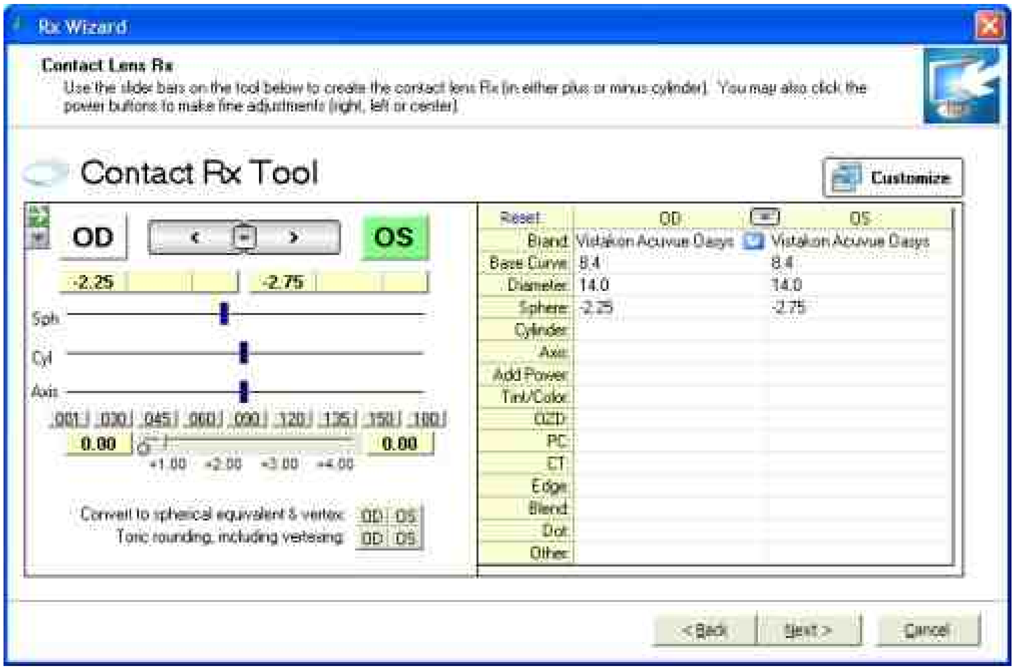
Spectacle Rx

Enter ophthalmic prescriptions by using the slider bars on the Spectacle Rx tool.



Contact Lens Rx

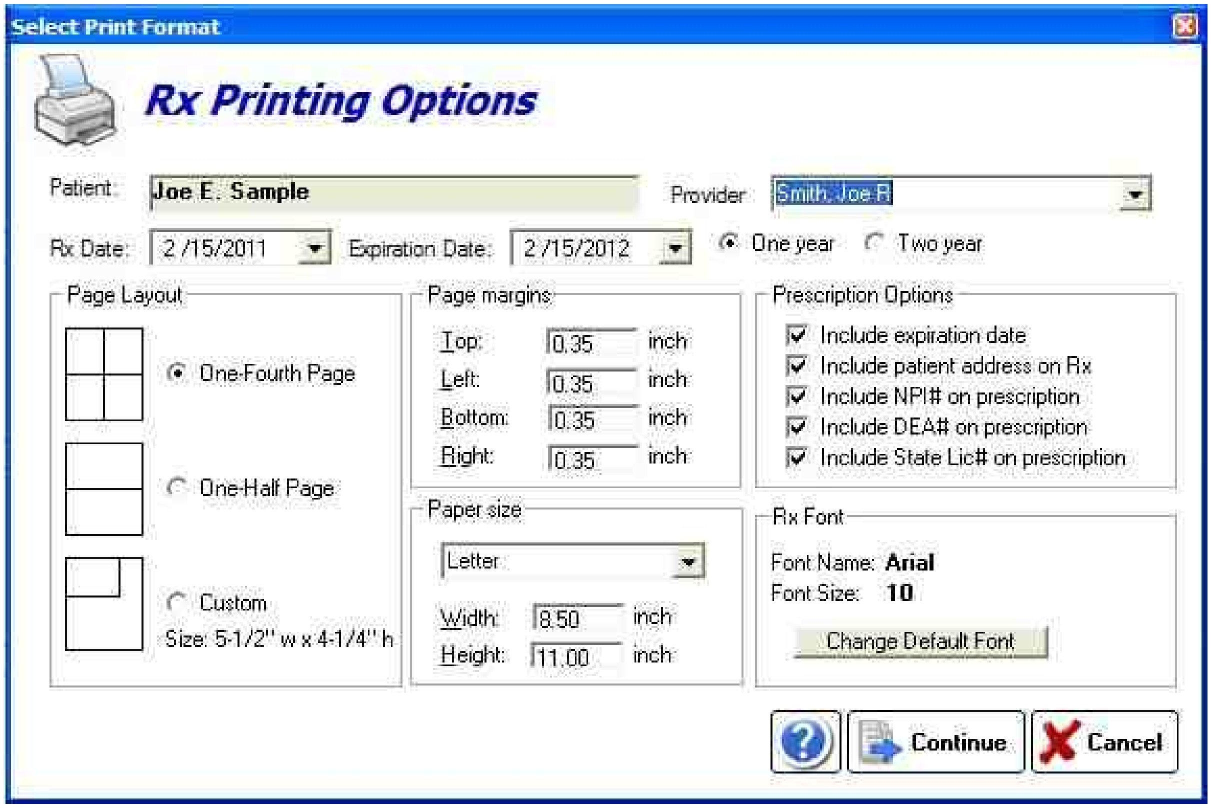
Enter a contact lens prescriptions by clicking the Brand from the right-side dropdown lists, then using the slider bars to enter the correct diopter power.



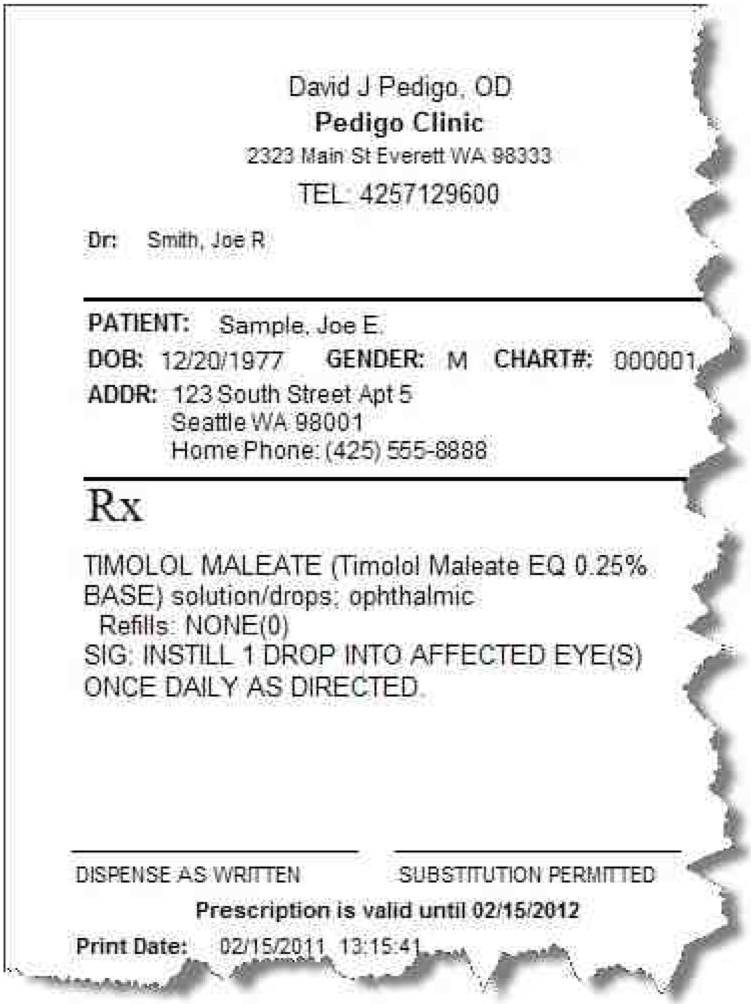
Printing the Rx

Click the Print Preview button at the bottom to begin the process of printing the Rx.

The Rx Printing Options screen displays. With this tool you can customize your Rx to the type of paper you are using (whether 2 or 4-part Rx paper) or just plain paper. You can also customize what information appears on the Rx. The font of the body of the Rx can also be adjusted. Any changes you make will be remembered for next time as the default (on the computer you make the changes on only).



Clicking **Continue** will display the actual Rx as it will appear. Once you print the Rx, click Close and you will be prompted to save a copy as an editable Report. If you do, the Rx will show up in the Encounter List.


David J Pedigo, OD
Pedigo Clinic
2323 Main St Everett WA 98333
TEL: 4257129600

Dr: Smith, Joe R

PATIENT: Sample, Joe E.
DOB: 12/20/1977 **GENDER:** M **CHART#:** 000001
ADDR: 123 South Street Apt 5
Seattle WA 98001
Home Phone: (425) 555-8888

Rx

TIMOLOL MALEATE (Timolol Maleate EQ 0.25% BASE) solution/drops; ophthalmic
Refills: NONE(0)
SIG: INSTILL 1 DROP INTO AFFECTED EYE(S) ONCE DAILY AS DIRECTED.

DISPENSE AS WRITTEN SUBSTITUTION PERMITTED
Prescription is valid until 02/15/2012
Print Date: 02/15/2011 13:15:41

3.3.4.3 Create a Report

Use the Report Builder wizard to create new reports and letters. Rx's can also be built this way (which allows for more customization, however you are limited to one Rx per page this way).

3.3.4.3.1 Using the Report Writer

Overview

This section of the manual explains how to use various commands to make your reports more legible and attractive.

Basic Text Editing

Navigating the report

You may already be familiar with functions of the standard cursor keys for finding your way around reports, particularly if they extend over more than a single screen. These commands are similar to those used by many word processors, particularly Microsoft Word.

Highlighting text

Wherever in the **Reports** window you happen to be working is where the *focus* is. Selecting an item means to highlight it to let you know it has been selected.

Insert and overtype modes

Just as in other word processors, whether you insert text or overwrite existing text depends on whether you are in Insert or Overtype mode, as displayed on the Status bar at the bottom of Report Writer main window.

Replacing text

When you need to replace text, simply highlight the part to be replaced, then immediately type the replacement text without needing to press **Delete**.

Deleting text

Press the **Delete** key to delete a selected block of text, or use the **Delete** or **Backspace** keys to delete one character at a time.

Undo and Redo

Pressing **Ctrl+Z** immediately you change your mind or realize you made an error will undo most report edits including formatting changes, so should always be tried before other methods. Press **Ctrl+Y** to redo the changes. The Report Writer remembers all your edits from the moment you selected the current node (enabling you to press Ctrl+Z successively to backtrack through your edits), but forgets them all as soon as you close the report.

Copying and Moving Text

Having selected (highlighted) the block of text, you have the choice of using the keyboard or mouse to accomplish these aims.

Drag-and-Drop Using the Mouse

Dragging the selected text block and dropping it at its new location is a quick and easy way to move text from one location to another within the same report. You can also use this to break up an report into smaller chunks by dragging and dropping each section where you wish it to be located. You can also copy text from documents in compatible applications such as Microsoft Word to the currently open report.

Cut/Copy/Paste using the keyboard

Having highlighted the block, press **Ctrl+X** to cut it or **Ctrl+C** to copy it, then **Ctrl+V** to paste it within the same or a different report, all using the Windows Clipboard. The target may be in the same report file, another report file that you open, or an open document in a compatible application such as a word processor. Although dragging and dropping is very easy to do, this method offers several advantages:

Using the keyboard to select text may feel more precise. Once text is copied to the Windows Clipboard itcan be pasted into multiple locations, whereas the entire drag-and-drop must be repeated each time.

Formatting Text

Although you can use the same font face, size and color throughout the report, text is much more attractive when headings are more prominent, subparagraphs are indented, etc.

Plain Text and Rich Text

You can add text colors, font faces, sizes and styles such as boldface, and the report is regarded as being in Rich Text Format (RTF). RTF reports can be converted to plain text easily, if desired:

Examples :

This paragraph uses Plain Text alone. All text is the same font face, style, size and color. Boldfacing, italics, underlining, etc. are not used; changing from lower case to UPPER CASE is the only way to make text more prominent.

This paragraph uses ***Rich Text***, which allows many more formatting attributes such as **color** to be incorporated. Adding color and images automatically changes the format from plain text to rich text, since both hide extra codes in the report (which the user cannot view).

Report Writer regards its reports as being in rich text format, but you can mix these within a file. Who would want to use plain text when rich text has so much more to offer? Here are two good reasons:

Plain text reports make the ezScriptWriter database much smaller, since there are no hidden formatting characters. This can make quite a difference when you have thousands of reports. You are not faced with the extra chore of reformatting to match the format of the rest of the report text if you copy and paste in plain text.

Note also that plain text reports cannot contain images, underlined hyperlinks, tables, boldfaced or other types of formatting. Converting a rich text report to plain text removes images and table cell borders but leaves the text itself.

Basic formatting commands

Let's concentrate now on rich text. You will find the most frequently used commands (bold, italic, underline, case conversion, font face/size/color/highlight color, etc.) displayed along the **Report formatting** toolbar. Let your mouse cursor hover over each toolbutton in turn to display a tooltip (text popup message) informing you of its function and keyboard shortcut, if there is one. Try them out.

Aligning and Indenting Text

Report Writer offers several methods for indenting and aligning text. Toolbuttons for many of them are on the **Paragraph** toolbar.

Alignment and justification

Click the Left, Right, Justify or Center toolbuttons (or press their corresponding shortcut keys) for text aligned with the left or right margins, both margins or center of the report.

Tab key and Auto Indent

Press the **Tab** key one or more times to indent the text an appropriate distance from the left margin. This is best used for short single lines, since tabbing and auto-indenting only affect the first line of a paragraph.

Bulleted and numbered paragraphs

Text which is bulleted and numbered is automatically indented. Round bullet symbols, numbers and letters are available. Toolbuttons for this are on the Paragraph toolbar.

Enclosing text in table cells

Just as in HTML pages, you can compartmentalize text in individual cells of tables for greater control when combining text and images. These advanced methods are discussed in Tables.

Inserting Items into Your Text

The Insert menu

Frequently-reused text (also known as "boilerplate" text) can be copied to the Windows Clipboard (see Copying and moving text), then pasted in where needed.

Tables

To insert a table where required, click Main menu / Table / Insert command. See the Tables section.

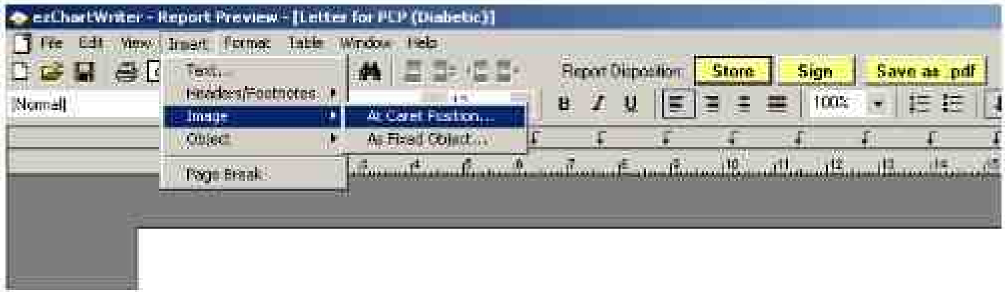
3.3.4.3.1.1 Using Images

Images

Since images may occasionally be required, ezScriptWriter allows you to display images alongside text. Images can flow with the text or be anchored to the page.

To Insert Images

Inserting images is very easy. You can do this by cutting and pasting them from the Windows clipboard, although we recommend that you use the **Insert command** to select the appropriate image(s) from image files already stored on your computer.



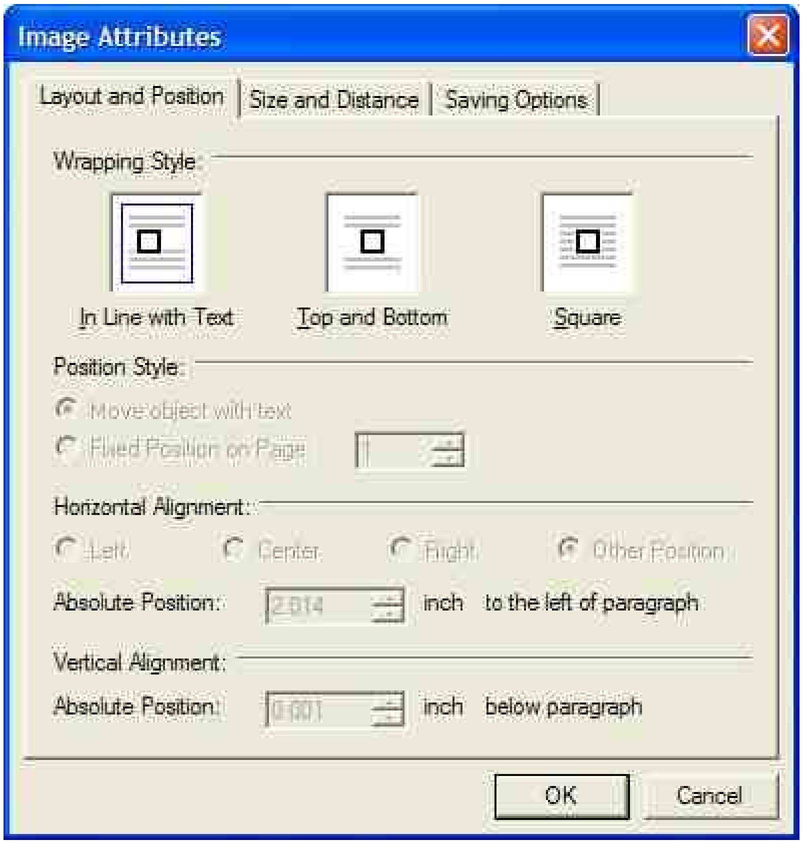
Find an image you would like to insert into your report and note its location in Windows Explorer.

Right-click in the report where you would like to insert the image and click ***Insert / At Caret Postion*** to open the **Insert image into report** window.

Navigate to the folder containing the image, click it to select it and then click **Open** to insert it at the current cursor position.

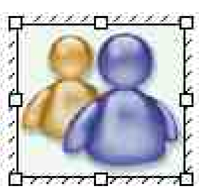
To Modify Image Properties

To modify the properties of an image, right-click the image to pull up the Image Attributes dialog. The position of the image as well as text wrapping style can be modified. Saving options allow embedding of the image (recommended for small-to-mid sized images) or saving externally (to the same folder as the database). See the Report Designer section for details on saving externally.



To Delete Images

To delete the image, click it (a border with small square "handles" will appear around it - see below) and press **Delete**. To undo this step, press **Ctrl+Z**.



This shows the border and handles that become visible on single-clicking an image. Reposition the image by dragging it when the border is visible, or re-size it by dragging one of its handles.

Copying, Cutting, Pasting Images

You can copy an image from one report to another, or even from a compatible document such as a Microsoft Word document, via the Windows Clipboard, simply by pressing **Ctrl+C** , **Ctrl+X** , or **Ctrl+V** to **Cut**, **Copy** or **Paste** the image respectively.

Moving, Positioning, and Resizing Images

Images can be **moved** and **repositioned** by dragging them, inserting spaces, tabs or text between them and the left margin, by indenting the left margin, or by enclosing the image in a table cell.

Resizing can be done by dragging the handles, but it is better to do this only to get a rough idea of their ideal size, then use an image editing program to resize them accurately while maintaining their proportion and re-import them.

3.3.4.3.1.2 Using Tables

Overview

Using the Tables toolbar you can create and edit tables. You can also combine and split cells, color cells, color the table, set the table border-width and color, delete and insert table rows and columns. This feature helps you create anything from simple reports to complex forms.

Working with Tables

To Create a Table in Report Writer

Click ***Main menu / Table / Insert table***. A dialog box will appear allowing you to choose:
the number of **columns**
the number of **rows**

This table has 3 rows, 2 columns, center alignment and a border:

Row 1 Col 1	Row1 Col 2
Row 2 Col 1	Row2 Col 2
Row 2 Col 1	Row3 Col 2

The best way to learn about tables is to create tables in various configurations within a test report.

To Alter a Table

Click inside a table in the report, then activate ***Main menu / Table*** . There are several menu choices, enabling you to alter the following table parameters.

Other methods of altering tables

- Editing text in tables
- Adjusting column width and position

- Moving a column or row
- Inserting and deleting rows and columns
- Splitting and combining cells

The proportional width of a table (as a percentage of the report width) can be altered by using the table properties dialog or by dragging the table-handles in the horizontal report ruler.

You can adjust the width of each column by dragging the dividing partition left or right.

To enter text within a table, position the report cursor in the appropriate cell and begin typing.

If you make a mistake in table creation, deletion or typing, you can generally undo your actions by pressing **Ctrl+Z** or clicking the **Undo** toolbutton.

To delete a table, position the report cursor anywhere within it and click ***Main menu / Table / Delete***. You will be asked to confirm your action. You can also delete a table without confirmation by inserting a blank line above and below if not already present, highlighting the whole table, including the two blank lines, and pressing **Del**. Highlighting just the table and pressing **Del** removes all text within the table but not the table itself. As mentioned above, you can restore a deleted table by pressing **Ctrl+Z** or clicking the **Undo** toolbutton.

You cannot easily move, copy , or swap whole columns or rows within a table; you must move each cell individually. For this reason you should design the layout of your table carefully before creating it.

Currently, you cannot create a table within a table.

Editing Text in Tables

Here are some more hints and tips about doing this.

As mentioned previously, text (or images) in one or more cells, rows or columns can be individually aligned (left | right | center) by highlighting it then choosing one of the alignment toolbuttons on the Paragraph toolbar (or via the Edit menu or a keyboard shortcut). Centering text and right-justifying dollars and cents can be very effective.

If you choose left or right alignment, the text will be hard up against the wall of the table, as cell padding is not provided. One workaround is to create extra hidden columns to act as margins. For example:

	Text hard up against left margin

		Add a dummy column

		Then hide its border

To hide the border, click anywhere in the cell with text, then click the Show left border toolbutton on the Table toolbar to disable it. This will be discussed more fully later. You can drag the Table toolbar off the Toolbars area, making it "float" closer to where you are working.

You can treat text in tables as you would anywhere else in an report. You can cut, copy and paste it.

You can select (highlight) a whole row or column by performing one of the following actions:

? Click-dragging the mouse cursor over it; or

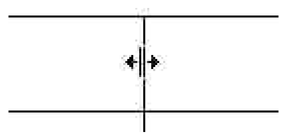
? Combining the **Shift** key with the **cursor** (arrow) keys to select multiple cells just like increasing the size of a highlighted section of text; or

? Clicking in one cell and selecting the ***Select table row*** or ***Select table column*** command from ***Main menu / Table***, or choosing the appropriate **Table toolbar** toolbutton.

Having highlighted these cells you can apply boldface, italics or color changes to the text or background.

Adjusting Column Width and Position

You can adjust the width and position of any column by dragging the internal vertical partitions left or right. When your mouse cursor passes over a partition, the cursor will change to a pair of vertical bars with arrows:



You cannot drag the horizontal partitions up or down, but you can add extra spaces to the entries in a row, or add a blank row or column.

You may need to adjust the partitions after deleting a column.

Navigating Within a Table

Think of a table as being a block of text that happens to contain vertical and horizontal lines. Use the **Tab** and arrow cursor keys if you don't want to keep reaching for the mouse all the time. To jump from cell to cell, left to right along a row and top to bottom, press the **Tab** key. To go in the reverse direction, press **Shift+Tab**.

The Right arrow key follows the same direction as the Tab key but stops at each character. Similarly, the Left arrow key follows the Shift+Tab key. The Up and Down arrow keys move up and down columns. Note that if you start from outside a table, the Down arrow key will move down the leftmost column and the Up arrow key will move up the rightmost column.

Moving Text, Columns, and Tables

To Move and Copy Text from Cell to Cell

The destination cell need not be an adjacent cell. You can move text anywhere within the table.

Alternatively, you can copy or cut a highlighted block to the Windows Clipboard and paste it in. This can be handy if you need to paste the same text into several cells.

1. Highlight the entire contents of a cell using the cursor keys or the mouse
2. Drag the highlighted block to the destination cell.

NOTE: If the destination cell is not empty you can use this method to insert the block into existing text.

To Move a Column or Row

You can only move one cell at a time using the method described in Moving and copying text from cell to cell; you cannot move a whole column or row. For this reason, you should plan your layout carefully before creating the table. However, you can achieve the same end by inserting a new row or column in the destination position, dragging the contents of each cell in the original row or column across to it, then deleting the original.

You can also copy one or more highlighted rows and paste them as separate tables, rearrange them vertically to form a new sequence and then join them. See Moving and copying tables.

To Move and Copy Tables

Whole tables, including contents, can be cut, copied and pasted, just like any other blocks of highlighted text, to and from the Windows Clipboard. They cannot be dragged. You can also copy one or more highlighted rows and paste them elsewhere (outside the table) as a separate table. However, pasting them back only replaces existing text corresponding to the number of rows you pasted in. Instead, create the same number of extra rows, then fill them with inserted text. The following example shows you how:

Example: Insert Table 2 into table 1.

aaaaa   Table 1
ddddd

bbbbb   Table 2
ccccc

Position the report cursor in the top row (aaaaa) of Table 1, then click the ***Insert table row*** toolbutton twice, to insert two rows.

aaaaa   Table 1

ddddd

bbbbb Table 2
ccccc

Now, position the report cursor in the top row (bbbbb) of Table 2, and press **Shift+Down** to highlight both of its rows. Press **Ctrl+C** to copy them, then position the cursor on the top blank row in Table 1 and press **Ctrl+V** to paste the text contents.

aaaaa Table 1
bbbbb Table 2
ccccc
ddddd

bbbbb Table 2
ccccc

Finally, delete Table 2 and tidy up. Done!

aaaaa Table 1
bbbbb
ccccc
ddddd

Inserting and Deleting Rows and Columns

To Insert a Row or Column

New rows are added below the selected row. New columns are added to the right of the selected column.

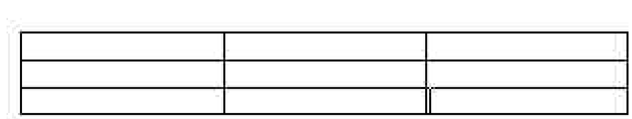
To add a row, select the existing row below which you want the new row to appear. by clicking in it.

Then:

Click the **Insert table row** icon; or

Click ***Main menu / Table / Insert table row***; or

Press the **Tab** key after positioning the cursor in the rightmost cell of the selected row. This will insert a new table row and move the focus to the first cell of the new row. E.g. (the graphics below are images, not tables):



Before

After

Successive clicking will add more blank rows.

To Delete a Row or Column

If you have just inserted one (blank) row or column too many, you can reverse this by clicking **Undo** (**Ctrl+Z**).

Alternatively, to delete a row or column, select it and click the **Delete table row** toolbutton.

If you need to remove a block of consecutive rows within a table, start at the top row to be deleted and keep clicking the **Delete table row** toolbutton until the deletion is completed.

Splitting and Combining Cells

To Horizontal Split and Combine Cells

Splitting and combining cells

You can **split** a cell into two horizontally by adding a partition, or remove it to **combine** two cells into one. Use the ***Split table cell*** and ***Combine table cells*** commands in ***Main menu / Table*** or corresponding **Table toolbar** toolbuttons.

Here is a table, originally 3 rows and 2 columns, which has had **split** and **combine** operations carried out on the second and third rows respectively.

<table>
<tr><td colspan="2"></td><td colspan="2"></td></tr>
<tr><td>Cell 1</td><td colspan="2">Cell 2</td><td>Cell 3</td></tr>
<tr><td colspan="4">Cells 1 and 2 combined</td></tr>
</table>

Splitting columns

To split a column of blank cells into two: highlight the whole column then click the **Split table cell** toolbutton.

To Vertical Split and Combine Cells

Vertical splitting relies on showing/hiding the top and bottom borders of adjacent cells.

Let's start with a 4-cell table:

Cell 1	Cell 2
Cell 3	Cell 4

Figure 1

Think of each cell as having four borders, like this:

Cell 1		Cell 2

Cell 3		Cell 4

Figure 2

To avoid grid thickening, either the upper cell's floor or the lower cell's ceiling may be visible, but not both. (Occasionally you may notice a double thickness grid wall but this will disappear when you return to the report after moving to another node or closing the file, so is an artefact.)

Cell 1 floor visible	Cell 2
Cell 3 ceiling hidden	Cell 4

Figure 3

Cell 1 floor hidden	Cell 2
Cell 3 ceiling visible	Cell 4

Figure 4

Cell 1 floor hidden	Cell 2
Cell 3 ceiling hidden	Cell 4

Figure 5

Note the misalignment in the floors of Cells 1 and 2 in Figure 3 compared with Figure 4, due to different show/hide selections. If you notice this when creating your own tables, ensure that these parameters match across the whole row.

We have thus "combined" cells 1 and 3, so let's add some blank lines and rename the combination Cell 5:

Cell 5	Cell 2
	Cell 4

Vertical splitting is essentially the reverse of this.

Selecting Rows and Columns

By clicking any cell and then choosing from ***Select table row*** or ***Select table column*** in the Table menu or the Table toolbar, you can select the whole row or column that includes that cell.

This command is useful if you wish to change the font attributes, colors, etc. of all cells in the row or column, or to clear the contents of the row or column. You cannot use it to copy, move, swap or delete a row or column.

You can also select a whole column, row or block of cells by click-dragging the mouse pointer or by using **Shift+cursor** keys. See Editing text in tables.

To Select an Entire Table

Clicking anywhere in a table and selecting **Main menu / Table / Select** entire table will immediately select the whole table, which can be very convenient if you wish to change the same property for all cells or to hide/unhide cell borders for the whole table.

Table and Cell Borders

The right-most eight toolbuttons of the Table toolbar determine whether the borders of the cells selected are visible or hidden. Click any cell and see which of these border toolbuttons are depressed. Clicking any of them again reverses their effect.

Fig. 1: Original

Cell 1	Cell 2
Cell 3	Cell 4

This is the original table.

Fig.2: **Hide borders**

Cell 1	Cell 2
Cell 3	Cell 4

This can be reversed by clicking **Show borders**[1].

Fig.3: **Show outer border(s)**

Cell 1	Cell 2
Cell 3	Cell 4

This can can be reversed by clicking **Show inner border(s)**

Fig.4: **Hide borders** then **Show inner border(s)**

Cell 1	Cell 2
Cell 3	Cell 4

This can be reversed by clicking **Show borders**.

Fig.5: **Show left border** and **Show right border** disabled in all cells

Cell 1	Cell 2
Cell 3	Cell 4

Fig.6: **Show top border** enabled in lower cells and **Show bottom border** enabled in upper cells.

Cell 1	Cell 2
Cell 3	Cell 4

Combining these borders results in a thicker line which makes a convenient divider.

Fig.7: **Show top border** disabled in lower cells and **Show bottom border** disabled in upper cells.

Cell 1	Cell 2
Cell 3	Cell 4

Fig.8: **Show right border** enabled in Cell 1 and **Show left border** enabled in Cell 2. **Show right border** disabled in Cell 1 and **Show left border** enabled in Cell 4.

Cell 1	Cell 2
Cell 3	Cell 4

Cells 3 and 4 display the standard configuration as seen in Fig. 1. You would expect that adding Cell 1's right border would cause a thicker partition, but its only effect is to stagger the existing one towards Cell 1. The only remedy is to disable Cell 1's right border.

If you highlight a block of text and accidentally click any of the Show ... border toolbuttons your paragraph will display a horizontal or vertical line along one of its borders like part of a table. Doing this deliberately is not recommended as such stray table cell wall lines may cause interference with text and prove difficult to remove.

Table and Cell Color

Report Writer gives you full control over table and cell colors. With the **table properties** screens you can set the global table color or individual cell colors, as well as the table border-color and border-width.

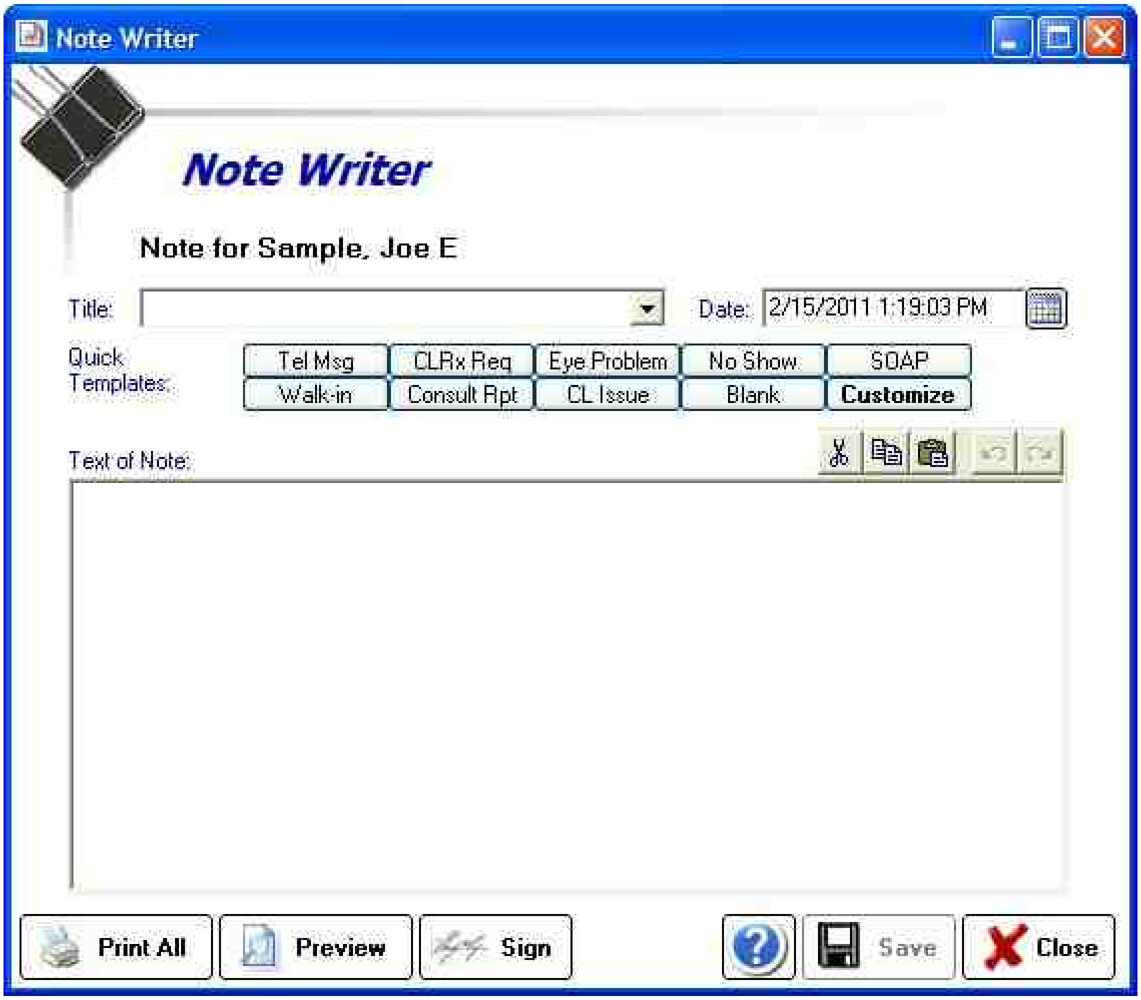
Table Hints and Tips

To Insert Images into Tables

Tables are a good way to store images, which can be inserted using the ***Main menu / Insert / Image at Caret Position*** command. Just like web-pages which owe their neatness to tables with hidden borders, you can hide the table borders once you have finished inserting images. If you wish to display the table frame (also referred to as a grid), you can space the image away from the cell wall by adding a blank line above (press **Enter**), or by adding spaces.

3.3.4.4 Create a Note

You can use the Note Writer to create simple chart notes on a patient. This can be useful for recording telephone messages or brief in-office encounters that don't warrant a full Exam Encounter.

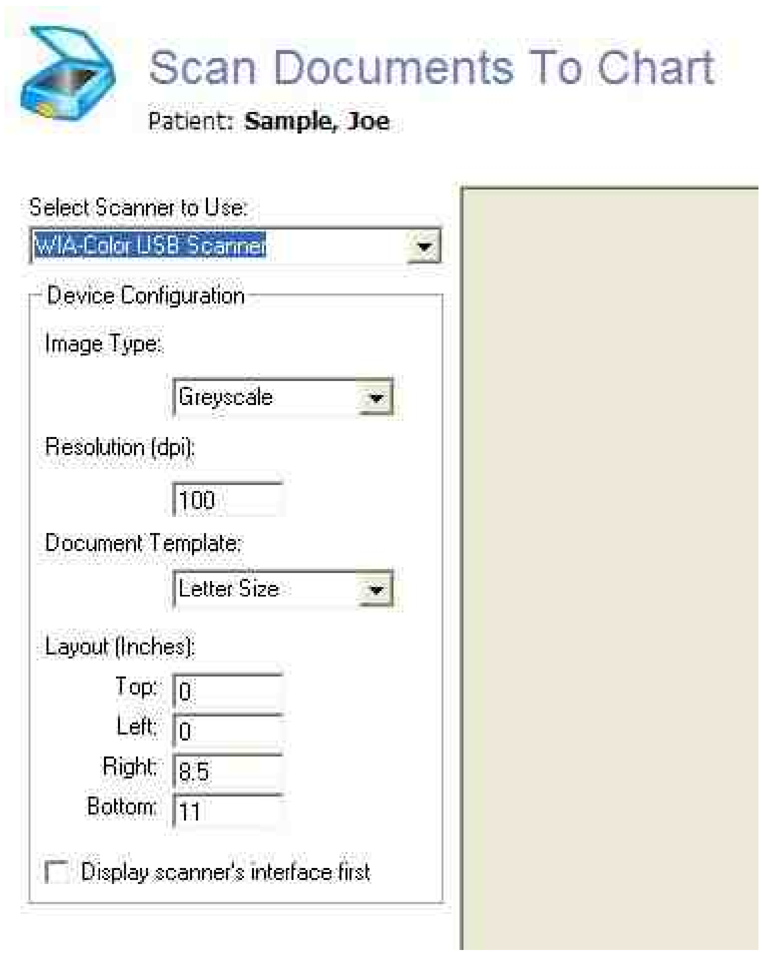


3.3.4.5 Attach/Scan a Document

There are two ways to get documents into the software: Direct Scan Method and Attach File Method. Both methods create a new folder item in your database folder containing a copy of the document. If you Attach a document, the original document stays in the present location and an exact duplicate is added to the Documents folder. You can browse the Documents folder by opening the database folder and clicking Documents. The documents are arranged by Patient Name (alphabetized), then by category.

WARNING: Do not move, rename or delete files in the Document folder as this will cause the file to become unavailable for browsing/opening in the Encounter List.

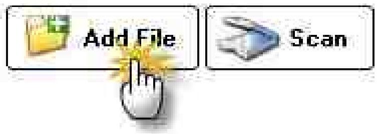
Direct Scan Method (requires a TWAIN compatible scanner):
Click the Scan Document button after you select <Add New>.



Attach File Method

To Attach a file that already exists (for example, a faxed/emaild pdf document or your own scanned document), click the Attachments button at the bottom of the Encounter List.

On the next screen, click the Add File button to locate the file you wish to Attach.



The document properties page appears and you must enter a category. Then click the browse button to attach the file.

3.3.4.6 Rx Logbook

The Prescription Tracking Logbook allows for tracking of all prescriptions created in the software. There are four categories:

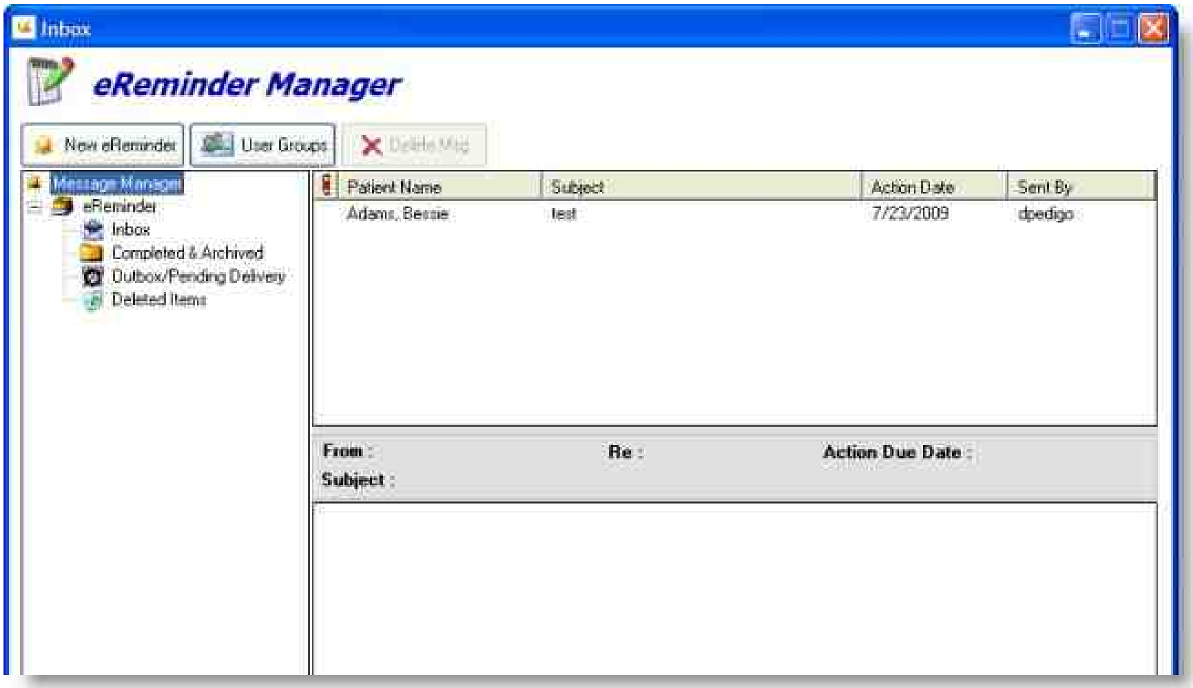
- Full Rx List
- Medications
- Spectacles
- Contact Lenses

Double-click an item to select. Use the Expand/Collapse checkbox to show/hide the full prescription.

3.4 Patient Reminders

Patient Reminders allows a method to send messages/reminders to yourself (or others) for specific patients, generally to be acted upon at some future date. For example, if you wish to remind your staff to call a patient in a week to check the status of an eye problem you would create an eReminder and set the send date for one week in the future.

Create/Send a New Reminder
Receiving a Reminder
Managing Reminders
User Groups



3.4.1 Create/Send a New Reminder

To create and send an eReminder, you fill out a form that resembles a standard email. The following fields must be entered:

To Field (REQUIRED)

Enter the user that the email should be sent to (or choose a user group).

Action Date (REQUIRED)

This is the date the eReminder will trigger and appear in the recipients inbox.

Patient (REQUIRED)

The patient that is the subject of the eReminder.

Subject (REQUIRED)

The reason for the eReminder.

Urgency

A flag for the level of urgency.

Mark as Confidential

If you wish to keep the eReminder from being read by anyone but the actual user, you can set a password.

eReminder Body

The text of the reminder (can be formatted by using the richtext controls).

3.4.2 Receiving a Reminder

When a Reminder is received, there are four options that the user can take:

Mark as Completed

Once you have completed the action required by the Reminder, you can mark it as completed by clicking the appropriate button.

Assign to Another User

To have another user take over the responsibility of the Reminder, use the Assign to Another User button. The Reminder will show up in their inbox.

Reset Due Date

If you need further time to finish the Reminder, simply reset the due date using the Reset Due Date button.

Discard

If you wish to delete this Reminder (for example, it is no longer relevant).

3.4.3 Managing Reminders

The Reminders can be located in four areas:

Inbox

Holds pending Reminders that have not been acted upon.

Completed/Archived

Contains a list of your completed Reminders (those marked as completed by the user).

Outbox/Pending

Those reminders that have not triggered yet (pending) will be listed here (only those of the user who created them).

Deleted Items

Any items that were deleted previously.

3.4.4 User Groups

You can group together users (e.g. "Staff", "part-time doctors", "receptionists") so that Reminders can be sent only to the members of that particular group.

To create a group, click New then enter a unique name for the group. Then click the names of the users to include and use the arrows to transfer to the "Current Members of Group" list.

3.5 Special Functions

The Special Functions menu allows you to perform various housekeeping functions on the database, manage report templates and rolodex names, report bugs and check for updates, and query the database.

- Database Maintenance
  - Backup Database
  - Compact Database

- Software Maintenance
  - Report Bugs
  - Check for Updates

- Data Management
  - Query/Statistics
  - Encrypt/Compress Reports

- Miscellaneous Functions
  - Report Designer
  - Rolodex Utility

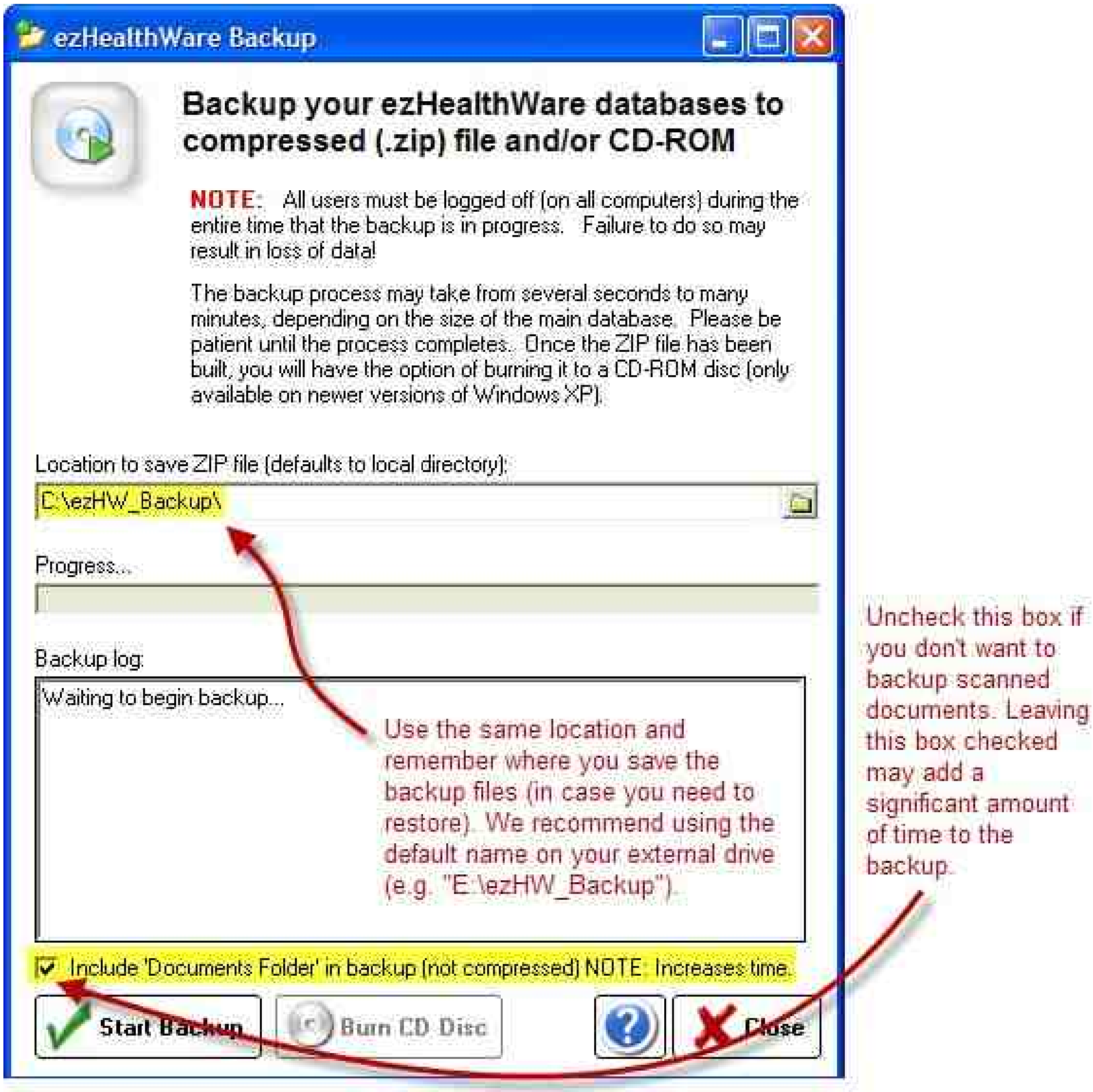
3.5.1 Database Maintenance

The Database Maintenance menu allows options for maintaining the health of your database.

[Backup Database](#)
[Compact Database](#)

3.5.1.1 Backup Database

Utility to create a compressed backup copy of ezScriptWriter's date files. We recommend that you perform a backup EVERY DAY and save the compressed file on removable media (CD Rom, USB Flash Drive, or another network drive). Store a copy of your database off-site (either using the removable media or an online data storage site). This off-site copy should be replaced weekly (if not daily).



You can do two types of backup's:

With attached/scanned documents included
If you leave the "Include Documents Folder" checked, the software will compare the existing backup document folder with the current and copy any new documents over. If this is the first time you are backing the documents folder up (or if the location does not have an existing copy to compare against), the process may take much longer than the usual backup.

Without documents
By leaving the checkbox unselected you can do a backup of just the main databases.

WARNING: NEVER save your backup folder to the same directory as the actual database files (e.g.

never use "C:\ezHW_Data\ezHW_Backup" as a backup location). You can use "C:\ezHW_Backup" on the same drive, however if you have a hard-drive crash you will lose both your original database and the backup(s). Instead, backup to an external drive or removable media.

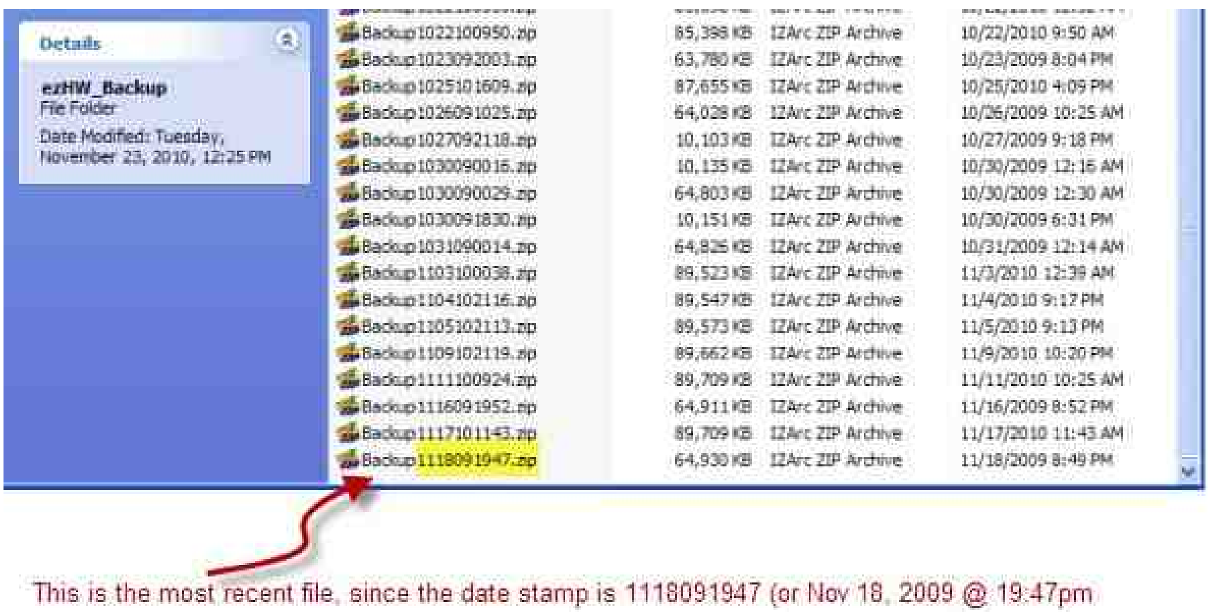
Burn CD Disc

If your computer includes a CD recorder, you can copy files to a writeable disc. This process is called burning a disc. Use the "Burn CD Disc" button to create a CD-ROM with your database files. This utility copies the files to the Windows temporary CD folder. You must complete the process by using the Windows CD Writing Wizard.

The CD Writing Wizard opens and prompts you for a label for the CD (it is pre-filled with the current Backup Date). You can enter up to 16 characters. Click Next and the wizard displays a progress bar indicating the status. If you did not select the Close the wizard after the files have been written check box, then a final dialog box opens, asking if you'd like to make an additional copy of the same files.

Restoring Database Files

Navigate to the folder you originally created to save your backups and open the backup file (it will have a name like “Backup090110xxxx.zip”. The numbers are a date/time stamp, so this example would be Sep 1, 2010. Once you have located the most recent backup (usually in the C:\ezHW_Backup folder on your primary computer, but that location may vary), then you need to uncompress (unzip) the file. Right click the file and select “Extract” (or just double click the file; in most versions of Windows this will start the uncompression feature). Once the folder has been extracted, you will see five databases (each end in ".dez" extension).



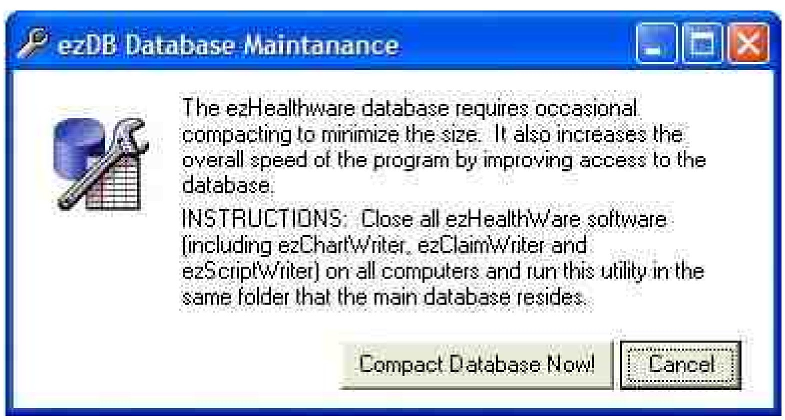
Typically the database file MOST LIKELY TO CRASH is the ezDB.dez file. So you should FIRST copy just that file over from your backup copy and see if the software starts successfully. If you know the exact order you entered patients since the last backup, you can re-enter them in the same order so the exact same Chart# is assigned. This way your ezReports.dez database can still be in sync. If you do not know the exact order, then you should copy the following THREE files to your primary ezHW_Data folder: ezDB.dez, ezReports.dez and ezImages.dez. The computer will ask if you wish to overwrite and you should respond yes. The ezToolData and events.dez files are not likely to crash and should only be copied if they do not currently exist in your ezHW_Data folder (be sure to check, because you will get errors if they are not there!).

WARNING: If you are restoring the database files from a utility other than ezBackup (for example, a utility you run every night to backup the entire hard-drive) you need to take extra precautions to ensure you do not accidentally overwrite good data with outdated files. If your backup software does incremental backups, you may only have ONE copy of the database to roll back to (and if it's corrupted you are out of luck). So, if you are using third-party backup, we still recommend that you use the ezBackup utility to create dated, compressed copies of your database nightly.

3.5.1.2 Compact Database

Utility to compress (compact) the database and sometimes repair minor data errors. We recommend you run the Compact/Repair utility about once a week to keep your data files in good condition. It’s HIGHLY RECOMMENDED to run the Backup utility before the Compact Utility.

The Compact Utility will automatically close the software on the current computer, but you MUST close out the software on any other computers on the network. This includes all modules (ezClaimBiller and ezApptScheduler).



3.5.2 Software Mantenance

Use these menu items to look for software updates or send bug reports.

Report Bugs
Check for Updates

3.5.2.1 Report Bugs

If you encounter a persistent error or glitch (programmers call them “bugs”), you can upload or fax a report to us so that the issue may be resolved. Simply follow the on-screen instructions to generate the bug report.

Bug reports are reviewed periodically to look for patterns and complete software crashes. If you have specific concerns you would like addressed, please submit the Bug Report with the error information and send an email to Tech Support with your concern. Bug Reports will not normally be answered on an individual basis.

3.5.2.2 Check for Updates

Occasionally you will notice that an Alert will appear at the bottom of the ezScriptWriter Login screen alerting you that an update to the software is available (assuming you have Internet connection for this check to occur):

This utility checks the Internet site for any updates to the software. If a newer version is found it is automatically downloaded and installed. You should run this utility every few months or when notified by ezScriptWriter Support Team of a new release.

3.5.3 Data Management

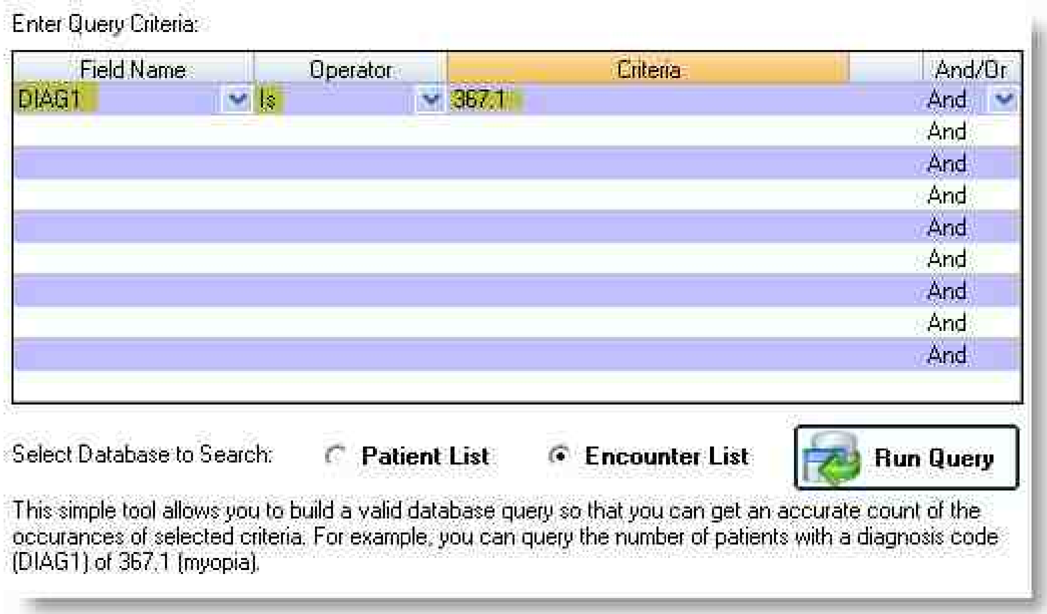
The Data Management menu allows for creating queries of the database (to find all patients with certain attributes) and to encrypt/compress reports.

3.5.3.1 Query/Statistics

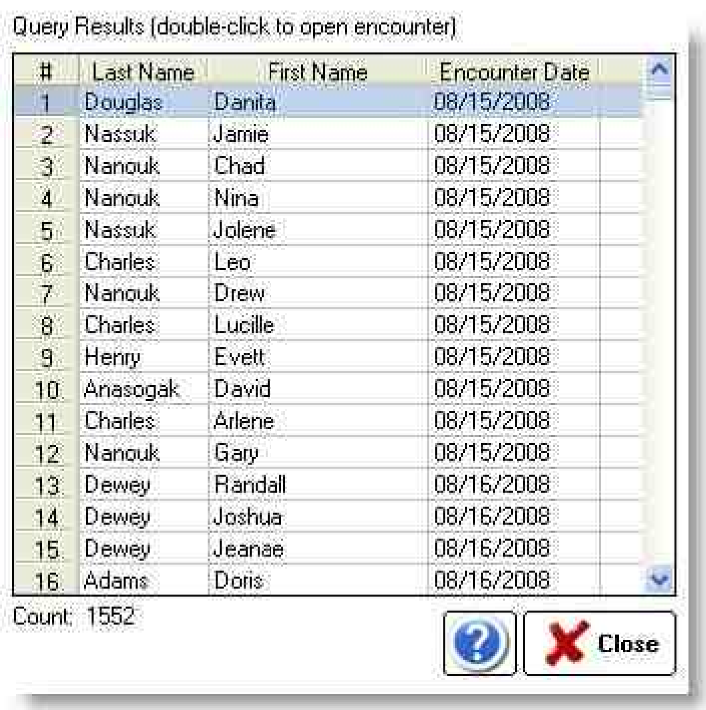
The QueryBuilder tool allows for mining of the database for specific search criteria. For example, to find all patients with a diagnosis code of "367.1", the steps below should be followed:

(1) click the Encounter List option (since diagnosis codes are associated with Encounters, not Patients)
(2) in the Field Name dropdown, select the DIAG1 field
(3) choose "is" as the operator (e.g. an exact match, so that ONLY the diagnosis is found).
(4) enter "367.1" in the search criteria field. This is what we are searching for in the database.

NOTE: To perform a complete search, you should repeat these steps for the other diagnosis fields DIAG2-DIAG4.



The Query Results screen will display. When working with encounters, the name can be double-clicked to open the Encounter.



Operator Choices:

"Is" - exact match
"Is Not" - does not match
"Contains" - the field contains the criteria
"Starts With" - the field begins with the criteria
"Ends With" - the field ends with the criteria

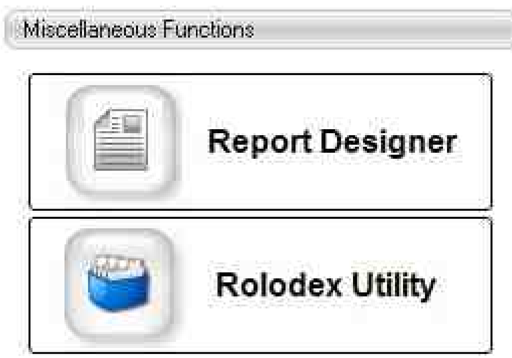
3.5.3.2 Encrypt/Compress Reports

To conserve space and/or to fully protect your database from prying eyes you can run the Encrypt/ Compress Reports utility. It converts the text-based report to a encrypted format that saves space and cannot be decoded outside the software itself.

WARNING: If you notice your ezReports.dez database growing close to the 1GB size you should run this utility.

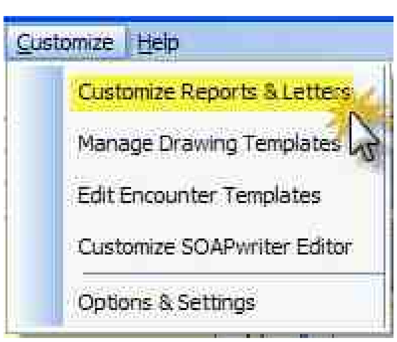
3.5.4 Miscellaneous Functions

The Miscellaneous Functions menu allows you to open the Report Designer and Rolodex Utility.



3.5.4.1 Report Designer

The Report Designer allows creation and editing of the various reports and Rx formats available in ezScriptWriter. When the report template screen finishes loading, you will notice that the reports are listed alphabetically by name and that each has a specific category name associated with the report. You can easily switch between an alphabetized listing of report name or by category by clicking on the heading bar.

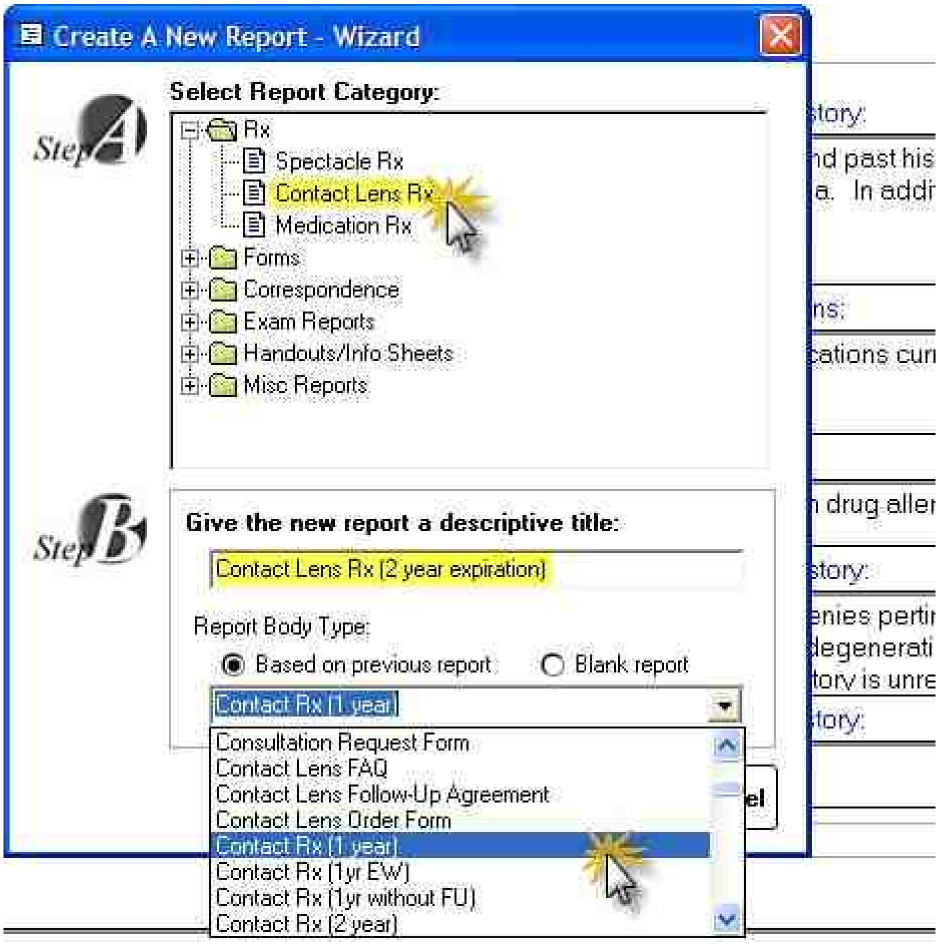


To edit an existing report, click on the name and then click the Edit button (or, alternatively, just double-click the report name). To create a new report click the New button and a dialog will appear to guide you through creating a new report:

Step A: Select an appropriate category for the report. If the report does not easily fit one of the pre-defined categories, use the Misc. Reports category.

Step B: Give the report a unique and descriptive name (for example, “Letter to Patient-Importance of Diabetic Control”). You may also indicate whether this report will be based on a prior report format or blank report. Even if you choose a blank report, you can easily copy and paste data from your favorite word processing program.

When the report, whether new or editing an existing report, opens, you will be in the Report Designer mode. The Designer looks and acts just like the regular report viewer with just a few important differences. The first difference is that the data you are working on is a Template from which your other reports are built. As such, the Template needs to be told what data to display.



There are three types of data you can insert into your template:

Static Text

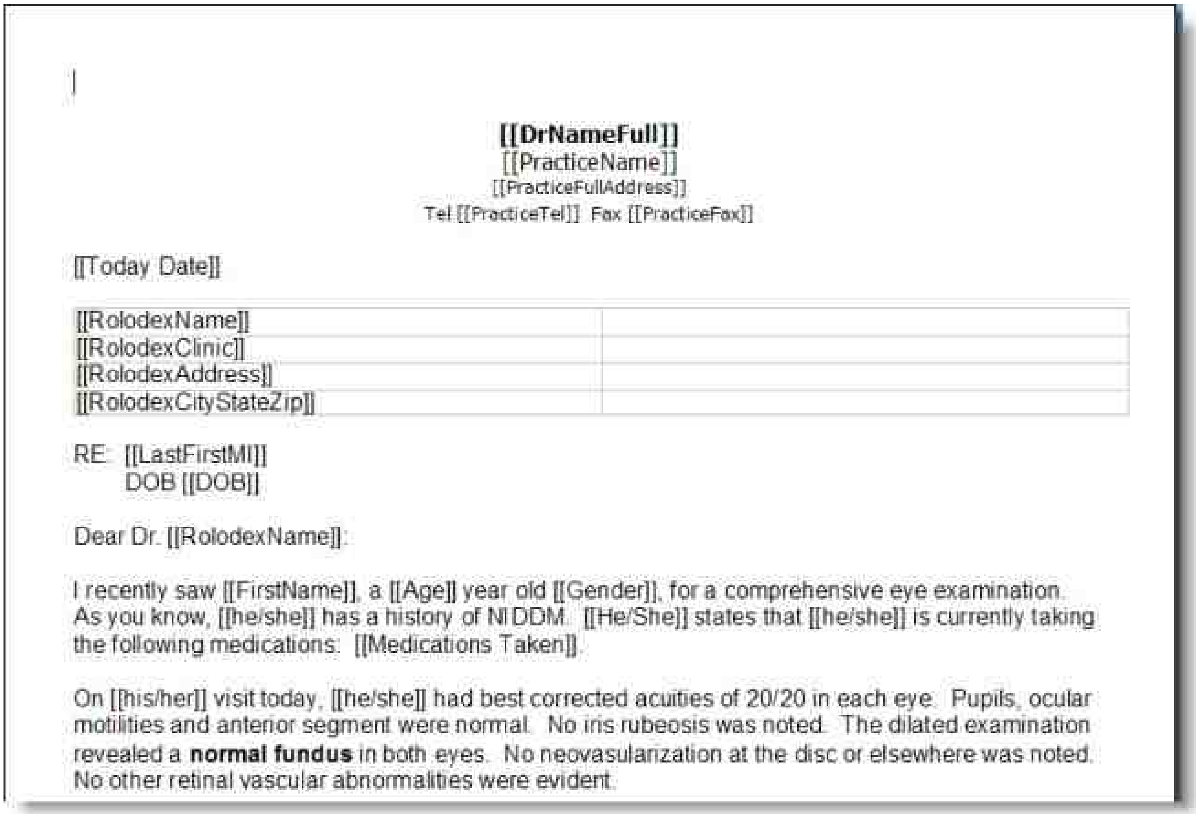
This is text that does not change and will be included in every report of that type. Examples include headings and labels such as “Date of Exam:” and “Report of Findings:”. You create static text by simply typing text in the Designer just like a work processor.

Dynamic Text (aka Fields)

These are special codes embedded in your report document that tells ezScriptWriter to insert text appropriate to, for example, a particular patient or provider, each Field has a specific format and looks like this:

Dear [[Name Title]][[Last Name]]:

The word “Dear” and the semi-colon “:” are static text. However, the double-bracketed fields indicate placeholders for data to be inserted, in this case the patients salutation (for example, Mr. or Mrs.) and last name. Using the list of pre-defined Fields, it is possible to generate grammatically correct and fully personalized letters, handouts and miscellaneous reports. Using even more specialized Fields such as [[MedRx]] you can create Rx’s for your patients. Many sample templates for various reports, Rx’s and letters have been created for you. Simply copy the old report to the new and edit the text and Fields as needed.



[[DrNameFull]]
[[PracticeName]]
[[PracticeFullAddress]]
Tel [[PracticeTel]] Fax [[PracticeFax]]

[[Today Date]]

[[RolodexName]]	
[[RolodexClinic]]	
[[RolodexAddress]]	
[[RolodexCityStateZip]]	

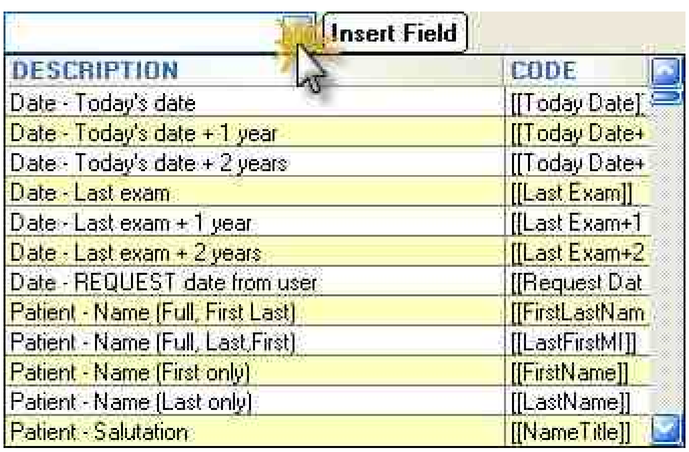
RE: [[LastFirstMI]]
DOB [[DOB]]

Dear Dr. [[RolodexName]]:

I recently saw [[FirstName]], a [[Age]] year old [[Gender]], for a comprehensive eye examination. As you know, [[he/she]] has a history of NIDDM. [[He/She]] states that [[he/she]] is currently taking the following medications: [[Medications Taken]].

On [[his/her]] visit today, [[he/she]] had best corrected acuities of 20/20 in each eye. Pupils, ocular motilities and anterior segment were normal. No iris rubeosis was noted. The dilated examination revealed a **normal fundus** in both eyes. No neovasularization at the disc or elsewhere was noted. No other retinal vascular abnormalities were evident.

Inserting Fields can be done using the dropdown list at the top of the Report Designer. A full list of available fields are listed below.



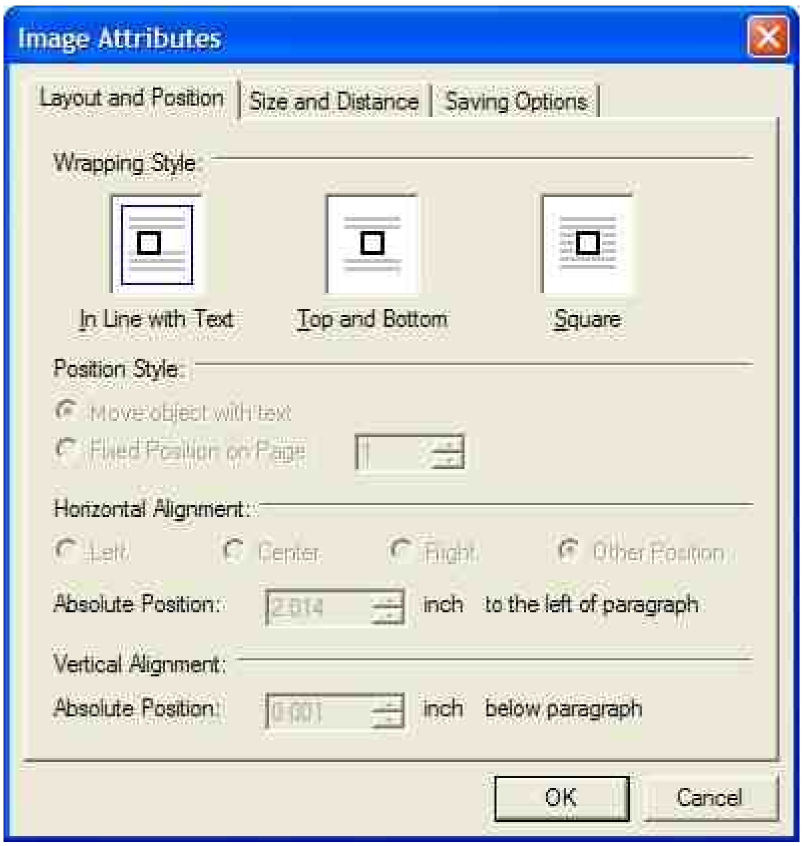
DESCRIPTION	CODE
Date - Today's date	[[Today Date]
Date - Today's date + 1 year	[[Today Date+
Date - Today's date + 2 years	[[Today Date+
Date - Last exam	[[Last Exam]]
Date - Last exam + 1 year	[[Last Exam+1
Date - Last exam + 2 years	[[Last Exam+2
Date - REQUEST date from user	[[Request Dat
Patient - Name (Full, First Last)	[[FirstLastNam
Patient - Name (Full, Last,First)	[[LastFirstMI]]
Patient - Name (First only)	[[FirstName]]
Patient - Name (Last only)	[[LastName]]
Patient - Salutation	[[NameTitle]]

Images

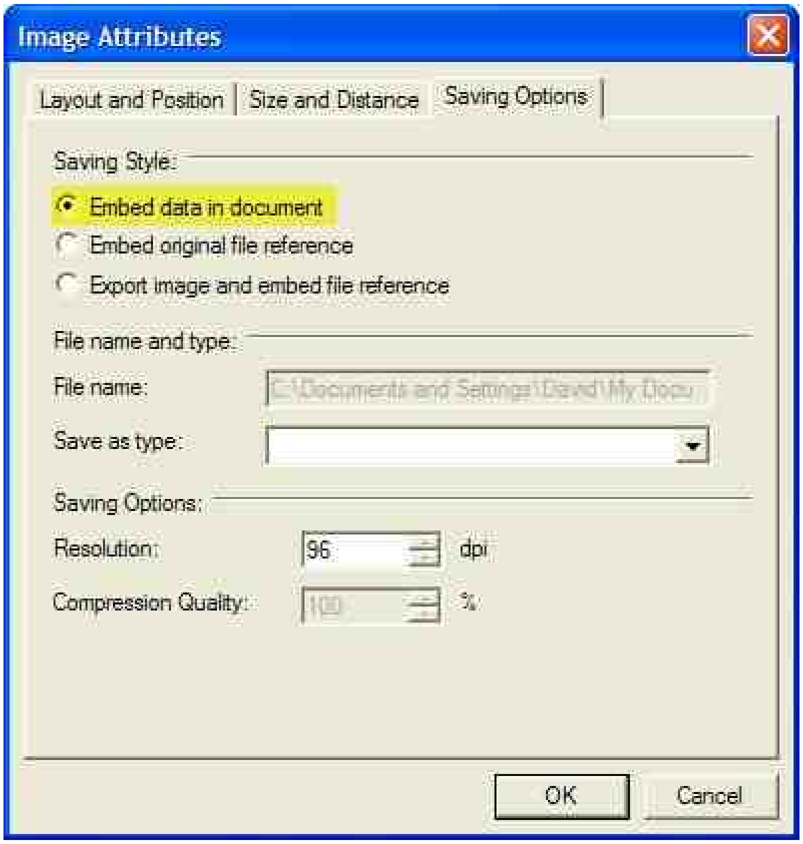
In addition addition to static text and FIELDS, you may also insert static images in your documents. These may be logos or signature blocks or any other image you desire.

WARNING: Images consume lots of disc space and if you embed a large image in a report, then each and every report you save will have a copy of that image saved to the database. It is recommended that you limit embedded images to small (under 10K) size. Examples would be a signature block. Typically, images that are embedded should be in ".jpg" or similar format, since they are highly compressed.

To modify the properties of an image, right-click the image to pull up the Image Attributes dialog:

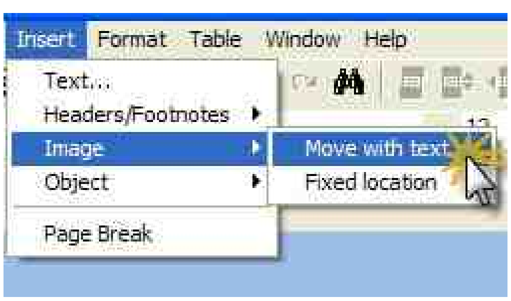


When saving the image there are three ways of doing so:

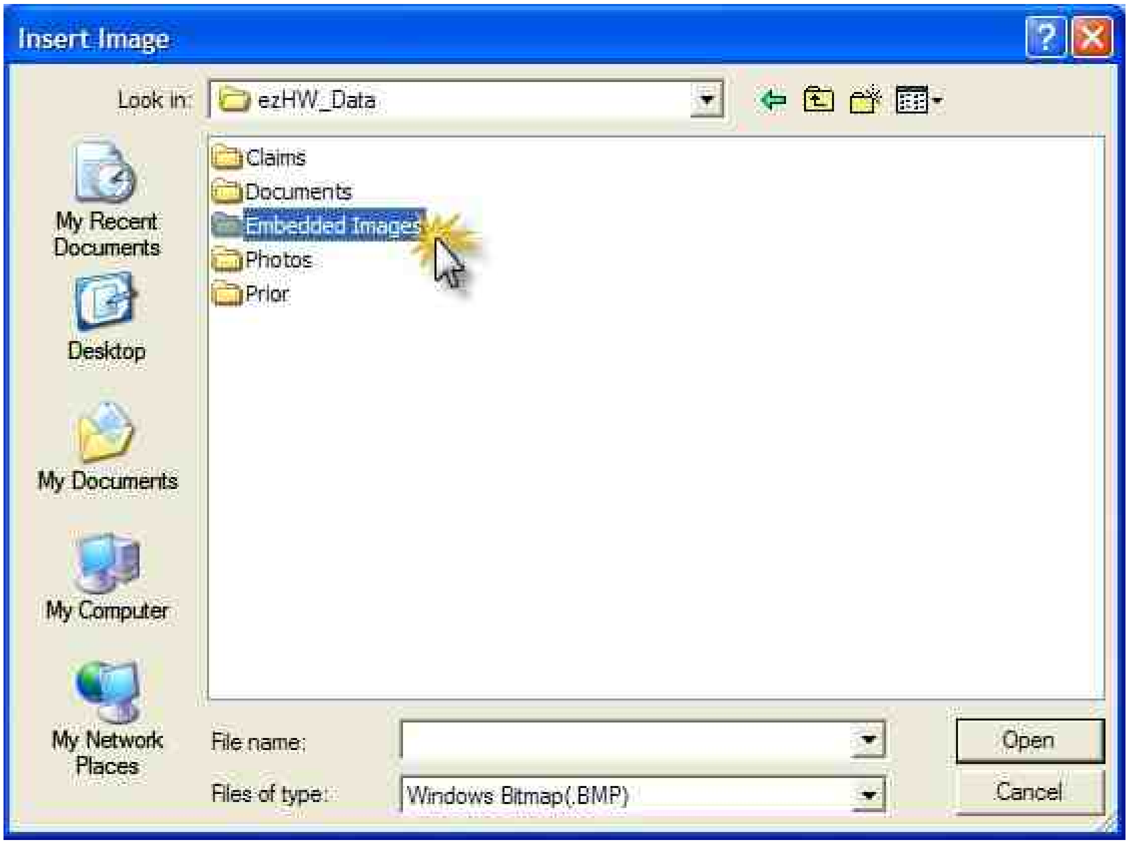


Embed data in document
This is the simplest way, but can quickly fill up your report database. Only use very small, low resolution images with this method. To convert and resize your image, use a product like SnagIt (www.techsmith.com) to reduce the resolution. If you embed too large an image you will receive a warning when attempting to save.

Embed original file reference
This is the best way to incorporate larger image files; the image is save seperately from the document and is displayed only when you open the document. The drawback is that the image must be stored in the database folder on the network. So create a subfolder in the C:\ezHW_Data folder called "Embedded Images" and then add your images to that folder (for instance signature stamps or practice logo). To insert the image, click the menu item **Insert->Image->Move with Text** in the Report Designer:



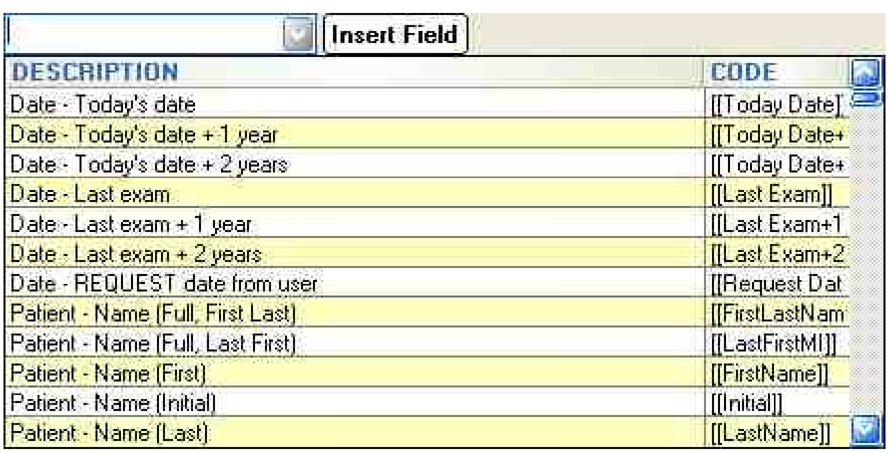
When the Insert Image dialog shows, navigate to your network database folder. Click on the image you wish to embed and click open. When you save the document, a link to this path to the image is saved. When you create a report this same path is maintained.



For more information on editing text and adding tables, see the Report Writer section of this manual.

3.5.4.1.1 Available Fields

This is a list of all Codes that can be inserted into Reports/Handouts/Rx's. Use the Report Designer to insert codes (some may not be in the dropdown menu, but you can manually enter them into the report).



DESCRIPTION	CODE
Date - Today's date	[[Today Date]]
Date - Today's date + 1 year	[[Today Date+
Date - Today's date + 2 years	[[Today Date+
Date - Last exam	[[Last Exam]]
Date - Last exam + 1 year	[[Last Exam+1
Date - Last exam + 2 years	[[Last Exam+2
Date - REQUEST date from user	[[Request Dat
Patient - Name (Full, First Last)	[[FirstLastNam
Patient - Name (Full, Last First)	[[LastFirstMI]]
Patient - Name (First)	[[FirstName]]
Patient - Name (Initial)	[[Initial]]
Patient - Name (Last)	[[LastName]]

[[Rx Date]]
[[Rx Date+1]]

[[Rx Date+2]]
[[Today Date]]
[[Today Date+1
[[Today Date+2]]
[[Last Exam]]
[[Last Exam+1
[[Last Exam+2]]
[[Enc Date]]
[[Enc Date+1]]
[[Enc Date+2]]

[[Request Date]] Prompts user to enter a Date
[[Consult Reason]] Prompts to enter a Consult Reason
[[RolodexName]] Prompts to select from the Rolodex
[[RolodexNameDegree]]
[[RolodexFirstName]]
[[RolodexLastName]]
[[RolodexInitial]]
[[RolodexSpecialty]]
[[RolodexDegree]]
[[RolodexClinic]]
[[RolodexAddress]]
[[RolodexCityStateZip]]
[[RolodexTel]]
[[RolodexFax]]
[[RolodexNotes]]
[[RolodexEmail]]
[[RolodexUPIN]]
[[RolodexNPI]]
[[RolodexFullAddress]]

PATIENT INFORMATION
[[FirstLastName]]
[[LastFirstMI]]
[[FirstName]]
[[Initial]]
[[LastName]]
[[NameTitle]]
[[Suffix]]
[[Age]]
[[DOB]]
[[Home Tel]]
[[Day Tel]]
[[Email]]

[[Primary Ins]]
[[UCPrimary Ins]]
[[Primary InsID]]
[[Guarantor]]
[[Primary InsGrp]]
[[Primary Auth#]]
[[GuarantorDOB]]
[[GuarantorGender]]

[[Secondary Ins]]
[[UCSecondary Ins]]
[[Secondary InsID]]
[[Secondary InsGrp]]
[[Secondary Auth#]]
[[SecondarySubscriber]]
[[SecondaryDOB]]
[[SecondaryGender]]

[[Nickname]]
[[Employer]]
[[Occupation]]
[[Chart#]]
[[UCFirstLastName]] UC means Uppercase
[[UCLastFirstMI
[[UCFirstName]]
[[UCLastName]]
[[UCNameTitle]]
[[UCSuffix]]
[[UCPrimary Ins]]
[[R]] Patient.Race
[[G]]
[[UCgender]]
[[Gender]]
[[He/She]]
[[he/she
[[His/Her]]
[[his/her]]
[[Him/Her]]
[[him/her]]

[[PatFullAddress]] Multi-line address
[[PatAddress1]]
[[PatAddress2]]
[[PatCity]]
[[PatState]]
[[PatPostalCode]]

[[CustomName#1]]
[[CustomValue#1]]
[[CustomName#2]]
[[CustomValue#2]]
[[CustomName#3]]
[[CustomValue#3]]
[[CustomName#4]]
[[CustomValue#4]]
[[CustomName#5]]
[[CustomValue#5]]
[[CustomName#6]]
[[CustomValue#6]]

PROVIDER/PRACTICE INFO
[[DrNameFull]]
[[PracticeName]]
[[ProviderFirst]]
[[ProviderLast]]
[[ProviderMI]]
[[UCDrNameFull]]
[[UCPracticeName]]
[[UCProviderFirst]]
[[UCProviderLast]]
[[UCProviderMI]]
[[PracticeTel]]
[[PracticeFax]]
[[PracticeEmail]]
[[PracticeWeb]]
[[PracticeAddress1]]
[[PracticeAddress2]]
[[PracticeCity]]
[[PracticeState]]
[[PracticeZIP]]
[[PracCityStateZip]][[PracticeFullAddress]]
[[GroupTIN]]
[[GroupMedicare]]
[[ProviderLic]]
[[ProviderDEA]]
[[ProviderDegree]]
[[ProvNPI]]
[[GroupTIN]]
[[GroupNPI]]
[[GroupMedicare]]
[[ProviderLic]]
[[ProviderDEA]]
[[ProvNPI]]
[[ProviderDegree]]

[[Final SRx]]
[[sphOD]]
[[cylOD]]
[[axOD]]
[[addOD]]
[[addOD]]
[[prismOD]]
[[prismOD]]
[[sphOS]]
[[cylOS]]
[[axOS]]
[[addOS]]
[[addOS]]
[[prismOS]]
[[prismOS]]
[[SRxNote]]
[[SRxRecommend]]

[[Final SRx]]
[[SpecRx]]

[[CLBrandOD]]
[[CLBCOD]]
[[CLsphOD]]
[[CLcylOD]]
[[CLaxOD]]
[[CLDIAOD]]
[[CLparametersOD]]
[[CLBrandOS]]
[[CLBCOS]]
[[CLsphOS]]
[[CLcylOS]]
[[CLaxOS]]
[[CLDIAOS]]
[[CLparametersOS]]
[[CLinstructions]]
[[CLRx]]
[[Final CLRx]]

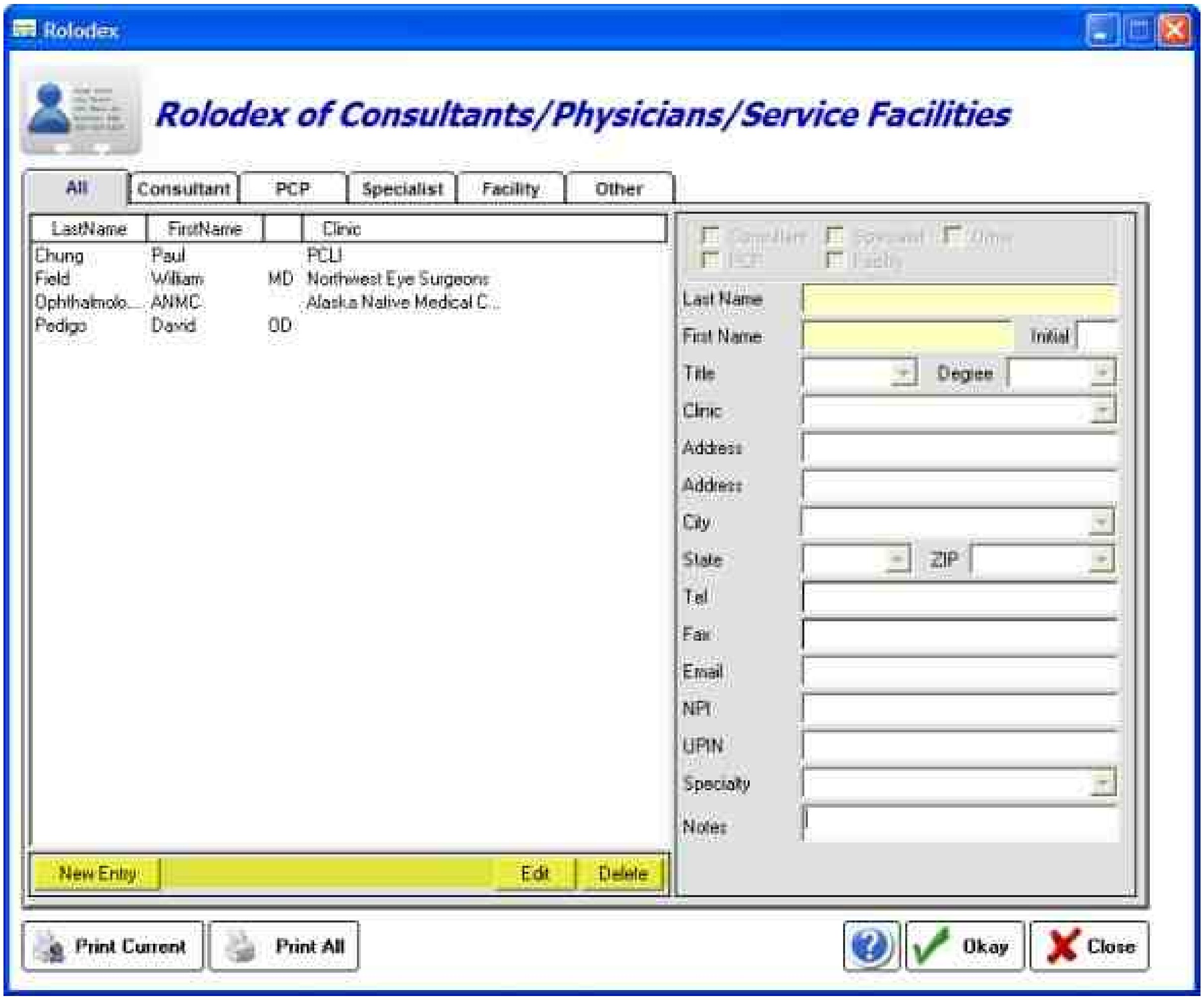
[[Med Rx]]

FOR USE BY THE SOFTWARE (DO NOT ADD/REMOVE)
[[SRxTool]]
[[CLRxTool]]
[[MedRxTool]]

3.5.4.2 Rolodex Utility

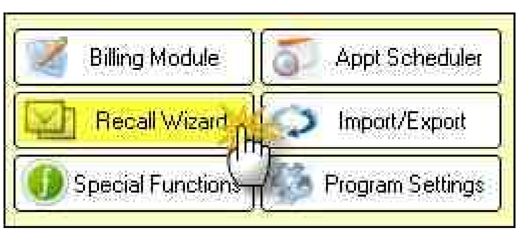
Allows managing of all your healthcare provider contacts (for example, consultants, PCP's, specialists and others). The Rolodex is automatically launched when reports include the Rolodex Field (for example, when writing a letter to a patient's PCP). You can add or modify existing entries simply by clicking the action buttons at the bottom of the screen.

Consultants - Doctors/providers to whom you refer patients
PCP - Primary care providers
Specialists - specialty medical providers (e.g. neurologists)
Facility - nursing homes or skilled health care facilities
Other - others that do not readily fit in the above categories



3.6 Recall Wizard

The Recall Wizard allows you to create and send recall notices to your patients. The tool is powerful enough to create specific patient lists for exporting also.



3.6.1 Creating a Recall List

Creating a Recall List is a three step process as shown on the Wizard:

Step 1 - Choose Patients for Inclusion

To begin the Recall process you need to select the Date Range:

Exam Date - selection is by the last exam date on file
Recall Date - selection is by the Recall Date you set (either when finalizing an encounter or on the HIPAA tab of the patient demographics screen)
Acquisition Date - selection is based on when the patient was originally acquired by the practice (date the patient was first entered in the system)

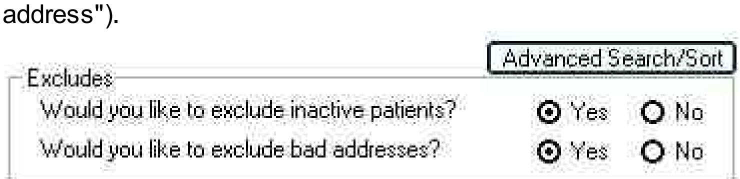
Select the date range that would encompass all the patients you are attempting to Recall. For example, you can select a one month period for the current month using the Recall Date option.

The patient selection criteria allow you to further refine your Recall List by specifying certain required attributes (for example, all female patients over the age of 40). This can be useful for marketing outside the standard recall system.

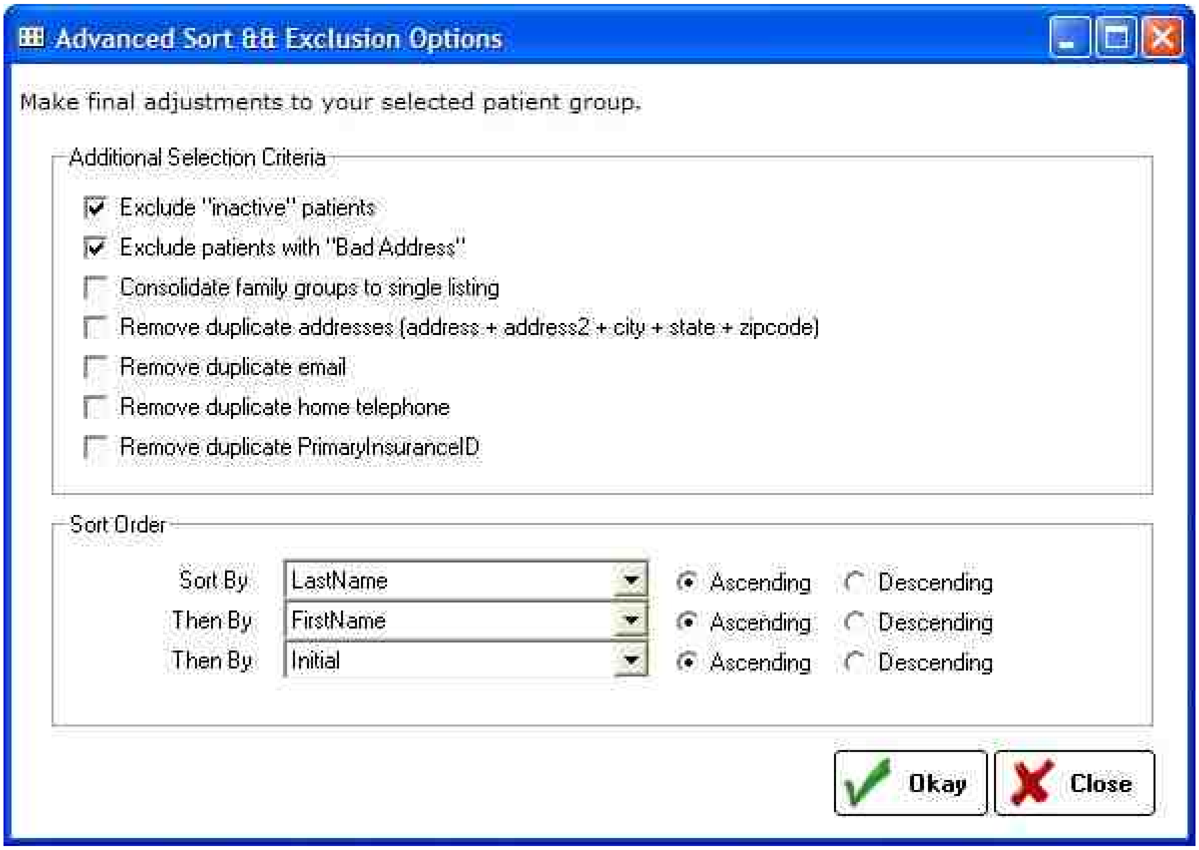
Step 2 - Review the List of Patients

After clicking the green next arrow, a list of patients found will be presented. This list can be further refined and sorted.

You have the option of excluding certain categories of patients (such as those marked "inactive" or "bad address").



To refine your list even further, click the "Advanced Search/Sort" button. This allows for removal of duplicates from the list (for example, family members at the same address will be consolidated to one mailing). A multi-level sort option is also available.



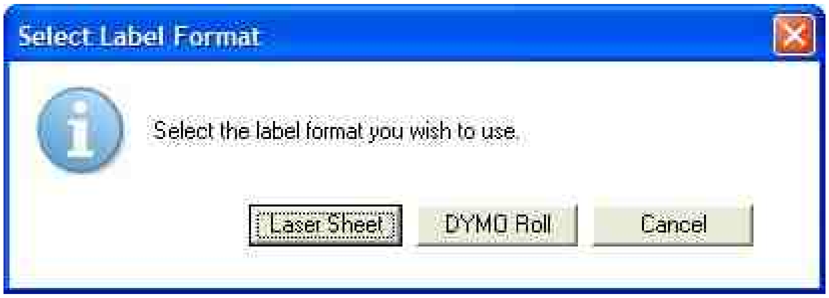
Step 3 - Select the Contact Method

The last step to creating a Recall is to select how you want the data presented (based on how it will be used). This can be one of five methods:

Create Labels
Create Form Letters
Generate Email List
Generate Phone List
Export the Data

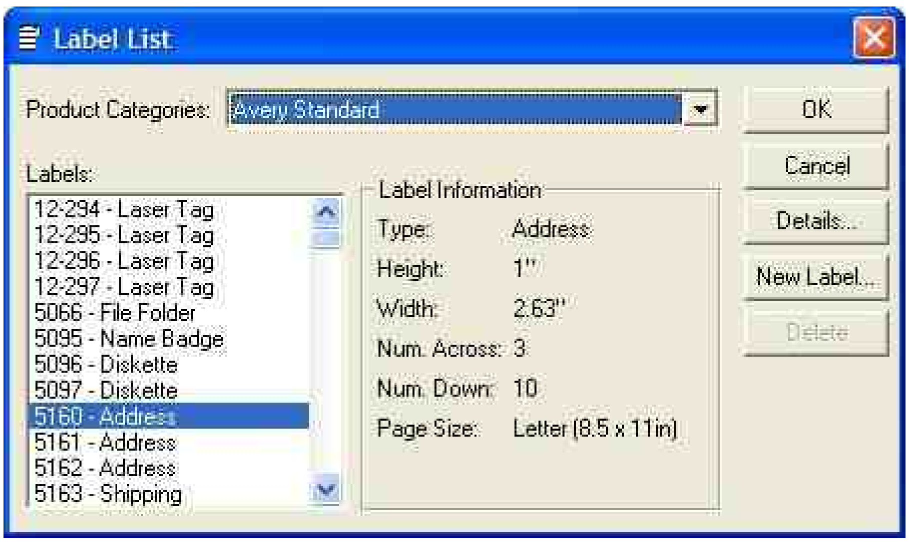
3.6.1.1 Create Labels

To create labels for a Recall mailing, click the Labels button. The Select Format dialog will display; choose either sheet (laser or inkjet) or DYMO printer roll. You must have a DYMO printer installed for this option to be available. Single or dual roll LabelWriter® printers are supported.



Using the Sheet Option

If you select the Sheet option you will first need to specify the correct labels. Using the standard Avery® label system numbers, you select the correct label number (e.g. for standard address use 5160 or 5161). You can click on a number to see the size and type. If you cannot find your label, use the New Label button to create a new one.



After you click OK, the Label Template dialog will show. A list of available templates (some pre-existing, some that you may have created) is displayed. Click on the one you wish to use (typically this would be the Avery 5160 label template to match the standard label) and click Load button.

The Label Layout Wizard will display with your select label layout displaying. You can alter the layout or just click Preview/Print to create your labels.

Add Fields

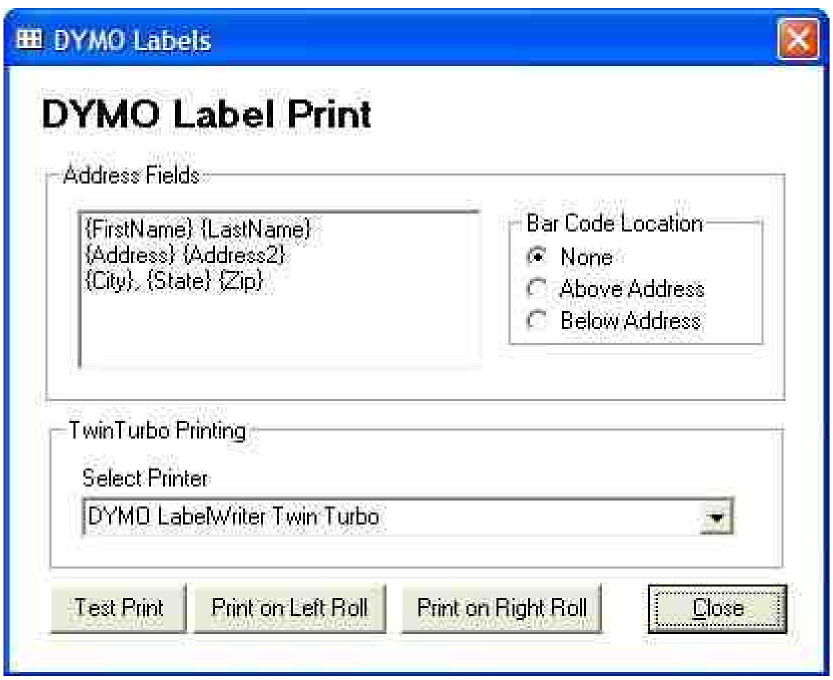
To add fields you double-click on the Field Selection list on the right side, then position them in the proper location on the label template. Use the Edit->Font menu at the top to set the label font.

Create Template

To create your own custom template, create the label layout you desire. Then select Templates->Save from the menu at the top. Choose a unique name that describes the label layout you created (typically you would want to use the Avery label number to keep things simple).

Using the DYMO LabelWriter® Option

The DYMO label printer makes printing labels very easy. Select the printer from the list (or the closest match). Be sure to do a test print to verify the positioning of your address fields. Then choose the correct roll (on dual systems) to begin the print job.

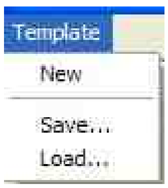


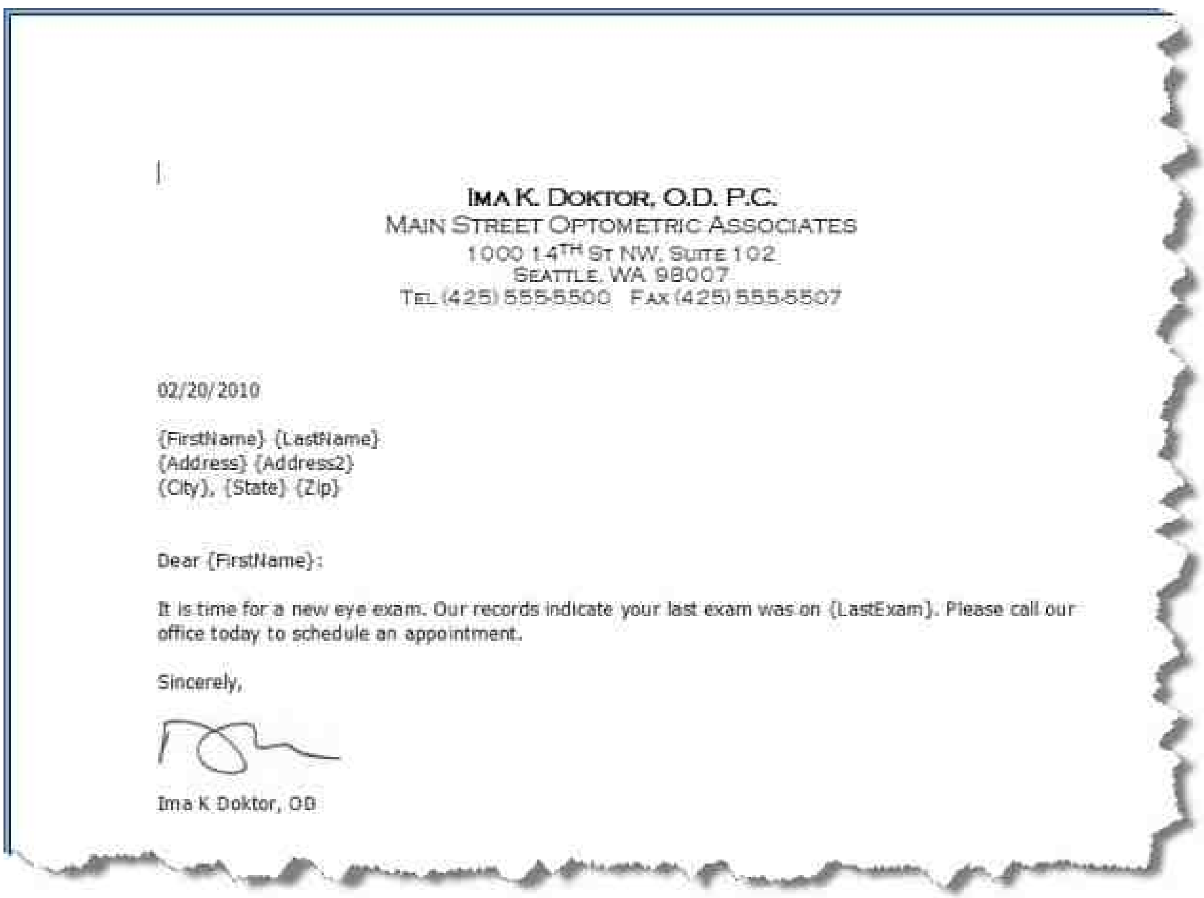
3.6.1.2 Create Form Letters

There are two views in the Form Letters section: Template view and Merged Document view.

Template View

This view allows you to edit the letter template (including a mix of data fields and regular text). To add text formatting (bold, fonts, etc) then create the document in MS Word or Wordpad first, then copy/paste into the template. Click **Template->Save** in the top menu to save your work.





IMA K. DOKTOR, O.D. P.C.
MAIN STREET OPTOMETRIC ASSOCIATES
1000 14TH ST NW, SUITE 102
SEATTLE, WA 98007
TEL (425) 555-5500   FAX (425) 555-5507

02/20/2010

{FirstName} {LastName}
{Address} {Address2}
{City}, {State} {Zip}

Dear {FirstName}:

It is time for a new eye exam. Our records indicate your last exam was on {LastExam}. Please call our office today to schedule an appointment.

Sincerely,

Ima K Doktor, OD

Merged Document

Click the Show Merged Document button to preview what an actual letter will look like.

Use the arrows to navigate through the letters. Click the Print All button to printout the merged letters.

3.6.1.3 Generate Email List

If you wish to generate a list of email addresses (for those patients that have one entered), use this utility. Currently, you must export the list of email addresses to be used by a third-party email service.

You can export to two formats:

Universal CSV Format - this is the standard comma-separated values. Lines in the text file represent rows of a table, and commas in a line separate what are fields in the tables row. The first record in a csv file usually contains column names in each of the fields (make sure the "Should column headings be included" is checked as yes).
Microsoft Excel Format - output is in Excel 2000 format ("xls" extension). This allows easy opening by Excel or similar spreadsheet programs.

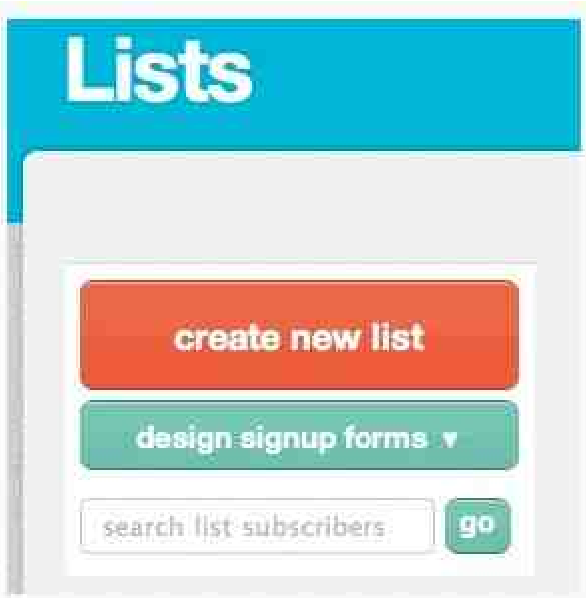
3.6.1.3.1 Using "Mail Chimp"

Mail Chimp (www.mailchimp.com) is a low-cost, high-feature email service that can manage your email campaigns. Currently, they allow up to 2000 names with no charge.

To use Mail Chimp, you must first sign up for a free account. Then, once you are logged in, you can create an email campaign. It's a three step process that the website will work you through.

Step 1 - Create and Import your List

The very first thing you should do is setup a managed list. This is because you can't really create and send an email campaign until you have a list to send it to.



create a new list

Step 2 - Setup a Campaign

Now that you have a list to send an email to, let's create an email!

create campaign

Step 3 - Reports

We'll show you how many times you opened and clicked in the test campaign, how many bounces you got, and more.

To download your reports per campaign go to *Reports > find the campaign whose reports you want to view > click on the Excel icon to the right of your campaign title*

download reports

3.6.1.4 Generate Phone List

Phone lists can be either previewed as a list on the screen or exported as a file (for upload to an automated phone blaster service, such as Dial My Calls.

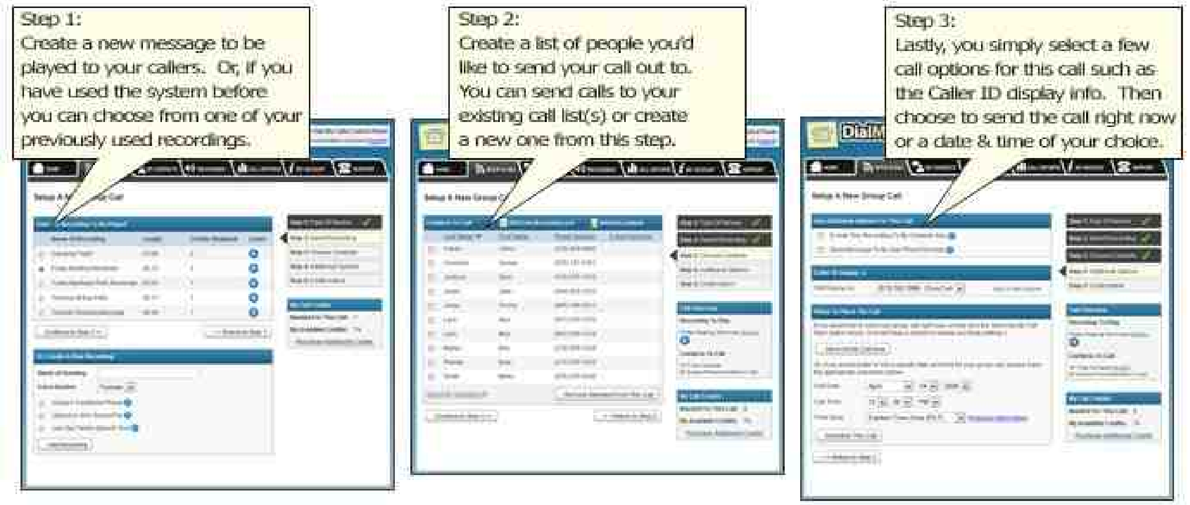
Preview List
The preview list can be used as a call list. It displays the patient's name, nickname, home and day phone numbers, and the insurance plan (if any).

Export List
The export feature allows exporting of the list of names/phone numbers in either CSV or MS Excel format.

3.6.1.4.1 Using "Dial My Calls"

DialMyCalls (www.dialmycalls.com) lets you send voice or text messages to an entire phone list in seconds. No hardware or equipment to buy - you simply record and send your message out to 2 or 200,000 phone numbers within minutes.

Setting Up A Call
Using the "Setup A Call" tab in the control panel, you can setup a call to a group of people in minutes. Follow the three steps below.



Manage Your Contacts
From your My Contacts tab, you can easily add, remove, and modify your call lists. Our call group features make it easy to manage multiple calling lists from one account. lists from one account.

Manage Your Recordings
Recordings are messages or greetings that you create that are played for your call recipients. You can add, modify or delete all your recordings at any time. There are 3 different options for creating recordings:

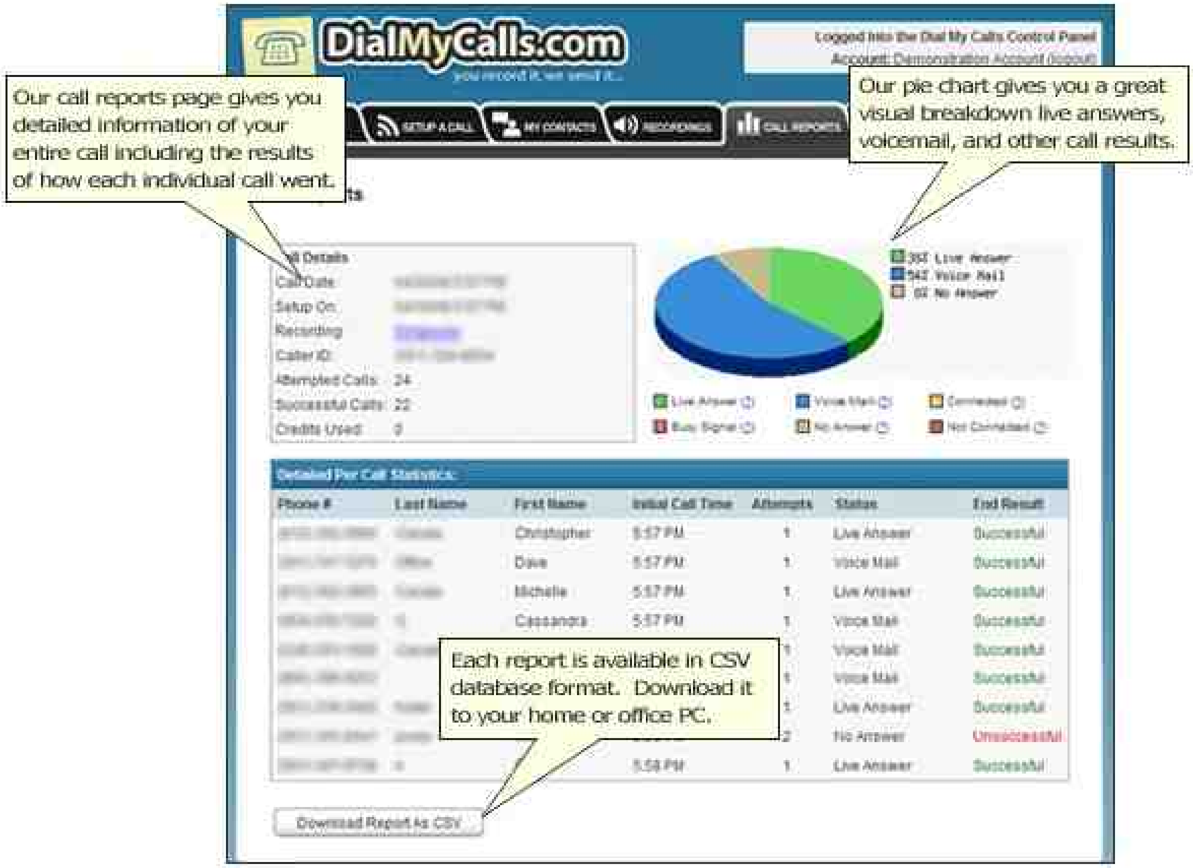
- **Record Over Your Phone**
  Put in a phone number and our automated system will call you and let you

record your message right over the phone! You can preview and re-record until you're satisfied with your greeting. This is by far our most popular method.

- **Upload A MP3 or WAV File**
  This method is usually the choice of larger companies or people that have professionally recorded messages. Using the web interface, you can upload any MP3 or WAV audio file and use it for the message to be played to your call recipients.

- **Use the Text-to-Speech Tool**
  The Text-to-Speech engine is a voice synthesis tool that will allow you to type a message and have it converted to a digitized male or female voice. This is a great solution when you don't have time to record a message but need to send a call out quickly.

Detailed Call Reports
After your calls have been sent out, you can receive complete breakdowns of your call status. You'll be able to see which calls were picked up, which ones went to voicemail and if there were any numbers with problems, such as invalid or disconnected phone numbers. You can even download your call reports into a spreadsheet.



3.6.1.5 Export Data

The Export Data function is a generic method to get your recall data out of the software into a standard file format (either universal CSV or MS Excel). Typically this method is used to create mailing lists that you send to third-parties such as Click2Mail (an approved USPS partner).

To open the file in Microsoft Excel, double-click the file (in the folder you saved it in) and it will display (if you have Excel installed).

3.6.1.5.1 Using "Click2Mail"

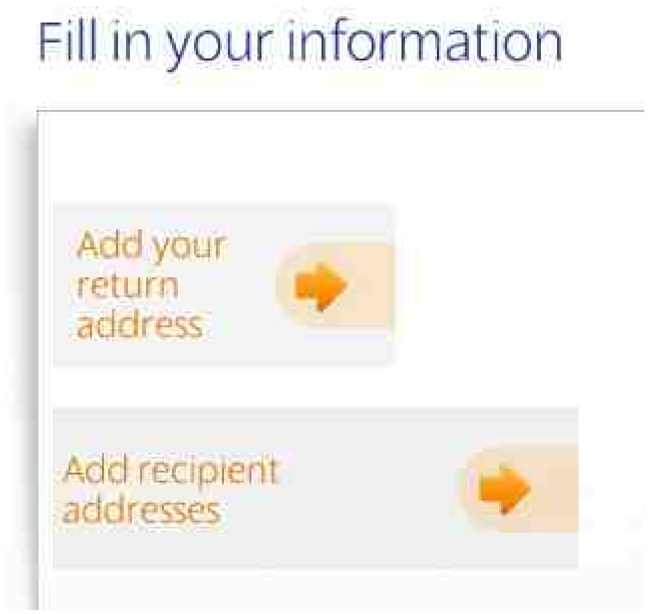
Click2Mail's (www.click2mail.com) "Easy Letter Sender" has simple fill-in forms making it easy, quick, and affordable to send a letter (with or without images) or a picture postcard. So easy, you can jump right in and start your mail piece in minutes. Other more advanced letter types are also available.

All you need is a few basic pieces of information

1. Return address: This is the name and address to which you want the mailpiece returned if it is undeliverable.

2. One or more recipient addresses: Enter one or more names and addresses or choose "Import addresses" to upload a list saved as a CSV file. A list template for use with Microsoft Office Excel is available here and when you choose "Import addresses" on the Recipient address fill-in screen.

Using the default font and size, page one of your letter holds 23 lines of text, or roughly 350 words, while subsequent pages hold 37 lines. Using the text editor, you can choose other fonts and sizes to produce different results. You regulate the number of pages you create by the amount of text you include in the text box. If you add more text than will fit on a page, the next page is automatically generated (10 page maximum). You will see how the pages are divided when you click "Preview".



3.7 Importing/Exporting Patient Data

Using the Import/Export wizard you can easily import patients from your existing Practice Management or EHR software. Alternatively, you can export patient demographics or reports/Rx's to text/PDF format.

Importing Data
Exporting Data

3.7.1 Importing Data

****
*****
WARNING: When you import data into ezScriptWriter, please review the column matches closely. If the data does not appear to match, then DO NOT IMPORT until you have found the matching fields (or marked them "unmatched"). Once you import patient data, there is no undo function!
****
*****

There are two options for Importing Data:

(1) Importing from a text (csv, comma separated values) file. This option works with files that you create by exporting to text format from your current software.
(2) Importing directly from an OfficeMate database. This pulls the patient demographics only.

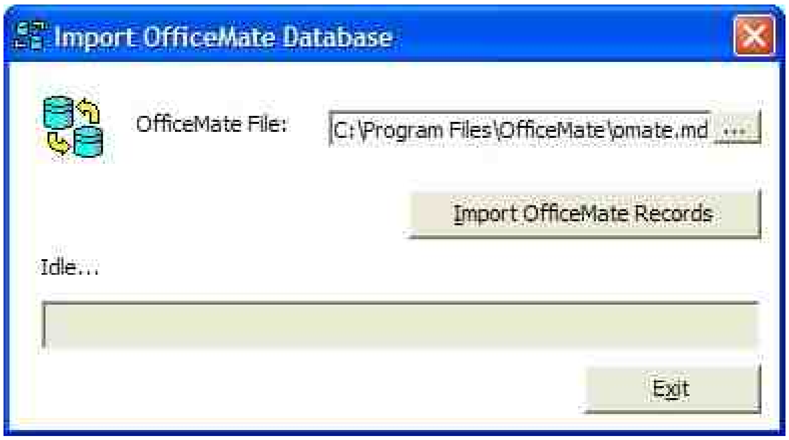
Using the Import Wizard

The Import Wizard helps you quickly and easily populate your new database with existing patients. It is, however, a basic tool. It will import patient demographic information (such as name, address, telephone, DOB, insurance info and other identifiers). The wizard requires the data to be in a standard text format such as CSV (comma-separated values) or tab-deliminated.
The current version of the Import Wizard will not allow you to import EMR or billing information. This type of data is too complex for the Wizard (smart as it may be). If you wish to populate your new database with more detailed information from your current practice management and/or EMR system, please contact Tech Support at support@ezscriptwriter.com for details and pricing on database conversion services.

If you get errors, or have other problems importing your patient data, it may be necessary for us to manually convert your data for you. There will be no charge if we can use your current text-based import file and we are importing only the data that the Wizard would normally handle. Additional fees will apply if your current software cannot generate an Export file or if you need addition and/or custom data imported.

OfficeMate Database Import

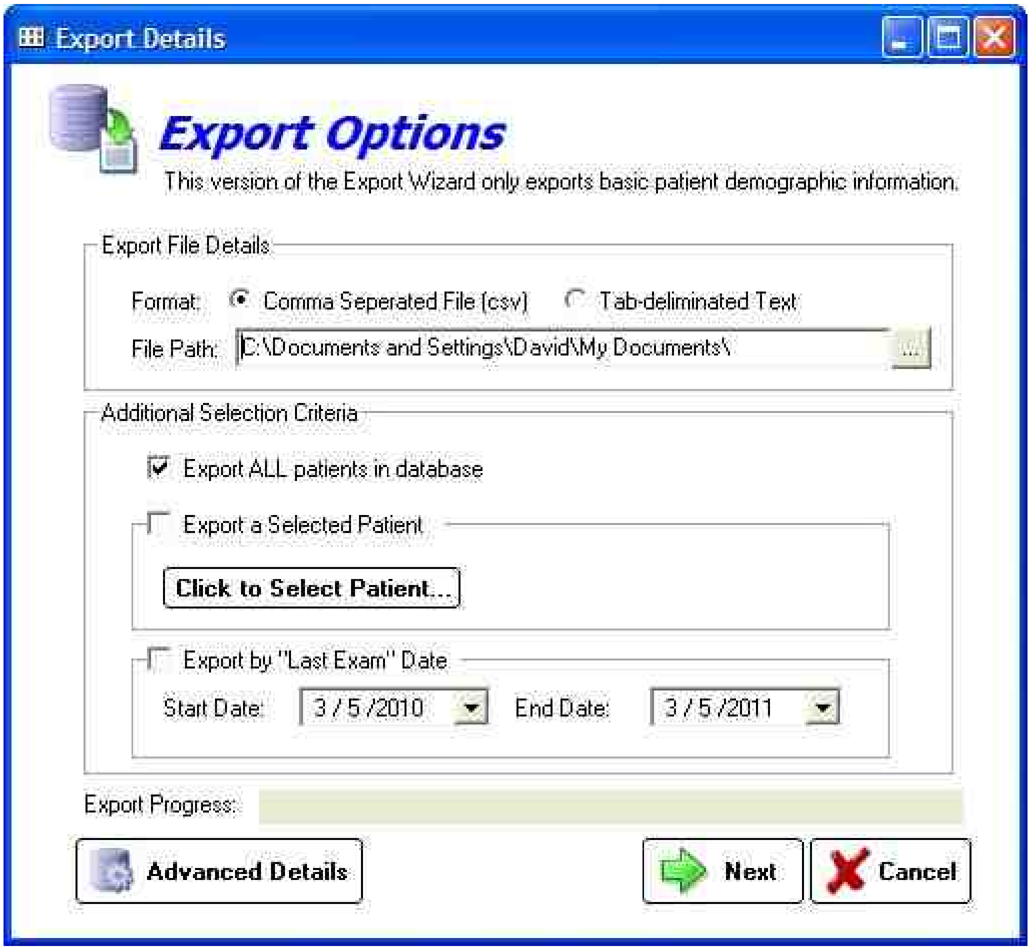
Use this utility to import the patients from the OfficeMate database directly into ezScriptWriter. Only the patient demographics will be imported.



3.7.2 Exporting Data

There are two options for exporting data:

(1) Export to a text or Excel File. This option allows you to export all patients or just a selected patient. You can also export by Last Exam date. The data exported is basic demographics (name, address, birthdate, etc), although if you use the Advanced button you can select more fields to export (not encounters or reports however).

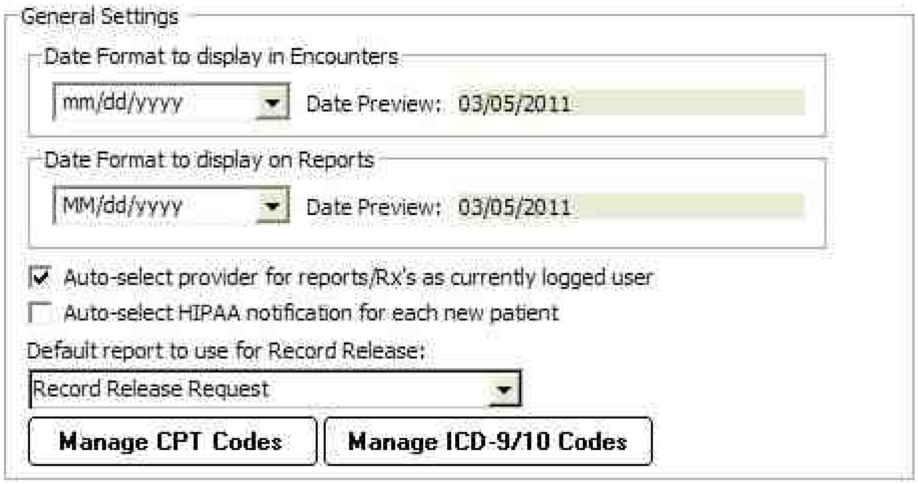


(2) Export reports/Rx's to PDF or MS Word (text editable). This can be useful for printing all the documents in a patient's chart (except for the Encounter itself, which are printed from within the encounter).

3.8 Program Settings

The Program Settings button allows for customization of ezScriptWriter.

General Settings



Date Format for Encounters

Allows customization of the way a date is displayed throughout the software (for example, mm/dd/yyyy format). You may use one of the three predefined formats or create your own.

Date Format for Rx/Reports

Allows customization of the way a date is printed on reports (for example, mm/dd/yyyy format). You may use one of the three predefined formats or create your own.

Auto-select provider for reports/Rx's as currently logged user

Determines whether the current user is selected as the provider for certain reports/Rx's.

Auto-select HIPAA notification for each new patient

Automatically create a HIPAA notification entry for any new patients. This indicates the patient was provided a copy of the clinic’s privacy protection practices.

Default Report for a Record Release

Select the default report for use when the user clicks the Print Record Release Form on the Patient Demographics window (under the HIPAA tab). Default setting is the report “Record Release Request”.

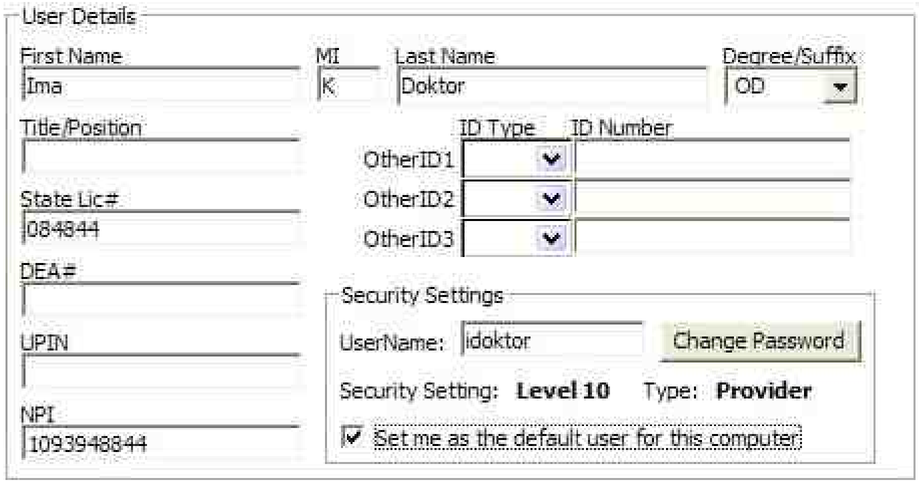
Manage CPT Codes

All the codes you need to bill for services and products can be entered in the Products & Service Codes screen. Some standard codes are pre-populated, but you will need to edit the Fee and Tax fields to reflect your practice fee schedule.

Manage ICD-9/10 Diagnosis Codes

You can add, delete, or edit the Diagnosis Codes (ICD-9 or ICD-10) using this utility. These codes are used on the FeeSlip in the diagnosis column and in the Assessment/Plan section of an Encounter.

User Details



This screen allows the user to modify their own information, including license and insurance ID numbers. Certain items (such as security level and user type) can only be modified in the Admin settings.

User Name/Password

You can change the username here as well as the password (if the current password is known; otherwise the Admin account must be used to reset it)

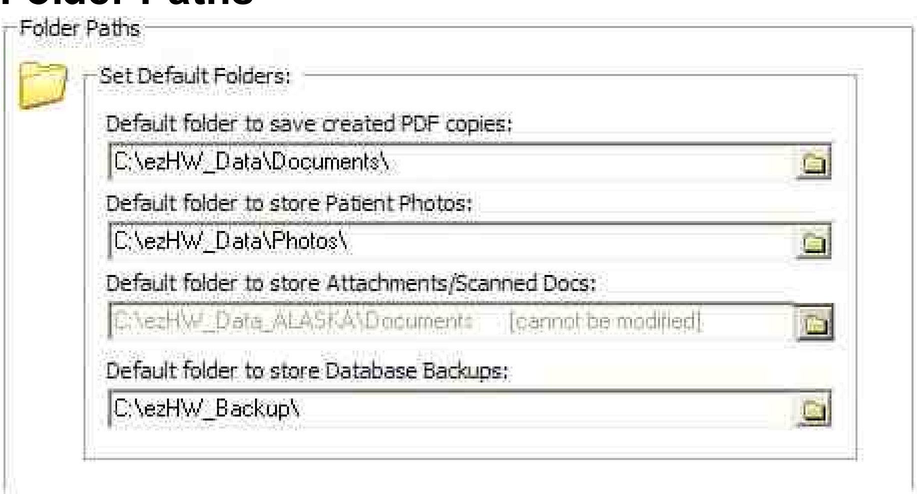
Security Setting

The user security level is visible (but only modifiable by the System Administrator). The user can, however, change their username or password on this screen.

Set me as the Default user

On each computer (network or solo), the default username displayed at startup (on the LOGIN screen) is determined by this setting. The user who primarily uses this computer should check this box.

Folder Paths



Set default locations for the following folders:

Path to PDF documents

When saving a PDF version of a report or Rx, this is the default location when asked to save file. Typically this would be your "My Documents" folder.

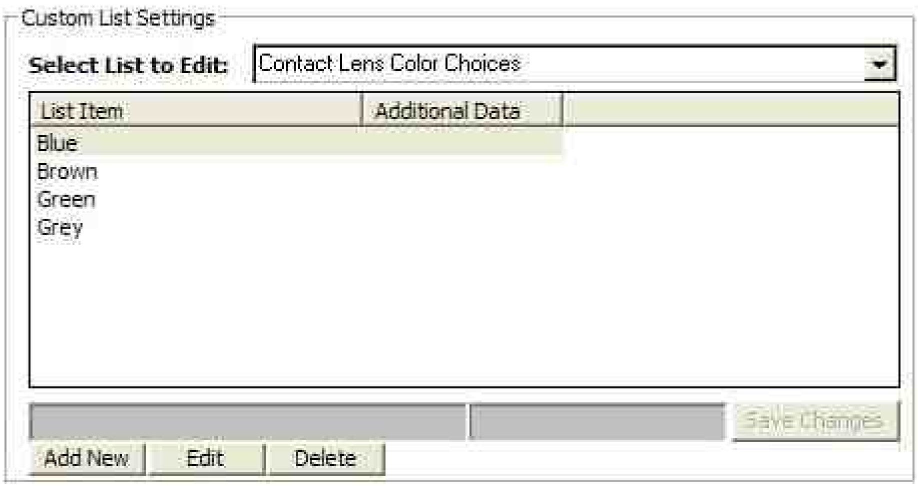
Path to Patient Photos

If you are capturing patient photos to include in the Patient Demographics window, this is the default location to store them. Typically this should be "C:\ezHW_Data\Photos".

Path to Database Backups

The default location where ezBackup stores backup images of your database.

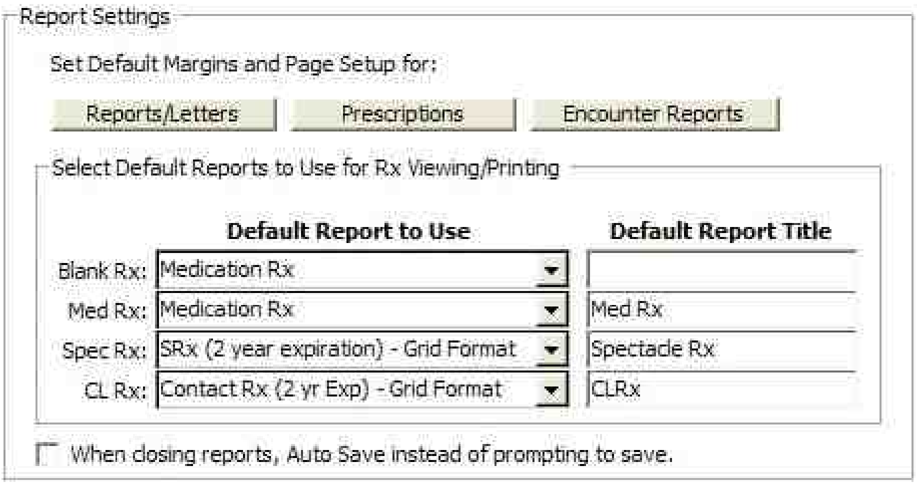
Custom Lists



Throughout ezScriptWriter, there are various lists and choices that can be customized. You may edit or add to these lists by performing one of the following:

- Selecting list to edit in the dropdown box at the top.
- Clicking on the item to edit, or alternatively, selecting the NEW button to add an item to the list.

Report Settings



Default Margins

The margin to use for reports, letters, Rx's and encounter printouts (if not set in the Report Designer) or otherwise not specified. This setting applies globally to all reports that do not allow you to set individual margins (e.g. when printing notes).

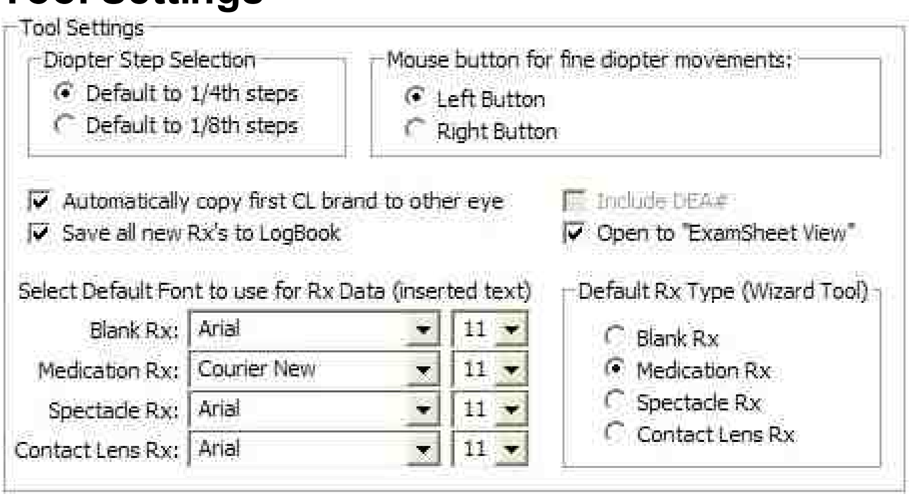
Default Report to Use

Allows the default report for each Rx type to be selected, as well as setting a default title. The four main Rx categories are: Blank Rx, Medication Rx, Spectacle Rx and Contact Lens Rx.

Auto Save

In some cases, you can specify that the software save your report without being prompted first.

Tool Settings



Allows customization of the Rx Tools in ezScriptWriter. The available options include the following:

Diopter steps

Applies to spectacle and contact lens Rx's. Can be either the standard 1/4 steps or in 1/8th steps (rounded to 2 digits however).

Mouse button

For fine adjustments on spectacle or contact Rx tools. Basically, this allows for the reversal of the effect of clicking on the right or left button. The default for fine movements is the left button (i.e. clicking with the left button increments or decrements the power by the default diopter step amount; the right button "jumps" to the clicked location.

Automatically copy first CL brand to other eye

Auto copies the selected contact lens brand from right eye to left (default is true) in the Contact Lens Tool.

Save all new Rx's to LogBook

Default is true; can be overridden when creating Rx with the Rx wizard.

Set default fonts

Set default fonts for the Rx data being inserted into reports. This can be modified if your reports are exceeding a full page when Rx data is inserted.

Default Rx Wizard

No longer used; the Multi-Medication wizard allows you to select the tool you wish to use.

Insurance List

The Insurance List allows for custom entry of any insurance plan you accept. The information you enter will appear on the claim exactly as you enter it.

3.9 PreTesting Module

[IN DEVELOPMENT]

The PreTesting module is in development. It will allow for entering of basic pretest information (e.g. visual acuities, lensometry readings) before an actual encounter is opened/created.

3.10 Software Versions

During the Trial period you may download and try any of the various version of ezHealthWare software. Once you have licensed the software, the database will only be associated with the software you have purchased.

ezFrontDesk

$89.00 annual license

Basic patient demographic management with appointments and insurance claim billing.

ezScriptWriter™

$129.00 annual license

Everything in ezFrontDesk plus the ability to generate printed or electronic Rx's.

ScanYourCharts

AN SIMPLE ALTERNATIVE TO EHR

$189.00 annual license

Hybrid of electronic patient charts with scans of your existing paper charts. Includes ability to print/electronic Rx's.

ezChartWriter™

$199.00 annual license

A full-featured EHR system designed for optometrists and ophthalmologists. Includes creation of printed or eRx's.

How the different versions of the software compare:	ezFrontDesk	ezScriptWriter	ezScanYourCharts	ezChartWriter
Patient Demographics	✓	✓	✓	✓
Patient/Insurance Billing	✓	✓	✓	✓
Appointment Scheduling	✓	✓	✓	✓
Marketing/Recall Letters	✓	✓	✓	✓
Attach Documents	✓	✓	✓	✓
Print Letters/Handouts	✓	✓	✓	✓
Print Prescriptions/Rx's	✗	✓	✓	✓
Logbook of Rx's Given	✗	✓	✓	✓
Scan Documents to Chart	✗	✗	✓	✓
Full Electronic Medical Records	✗	✗	✗	✓

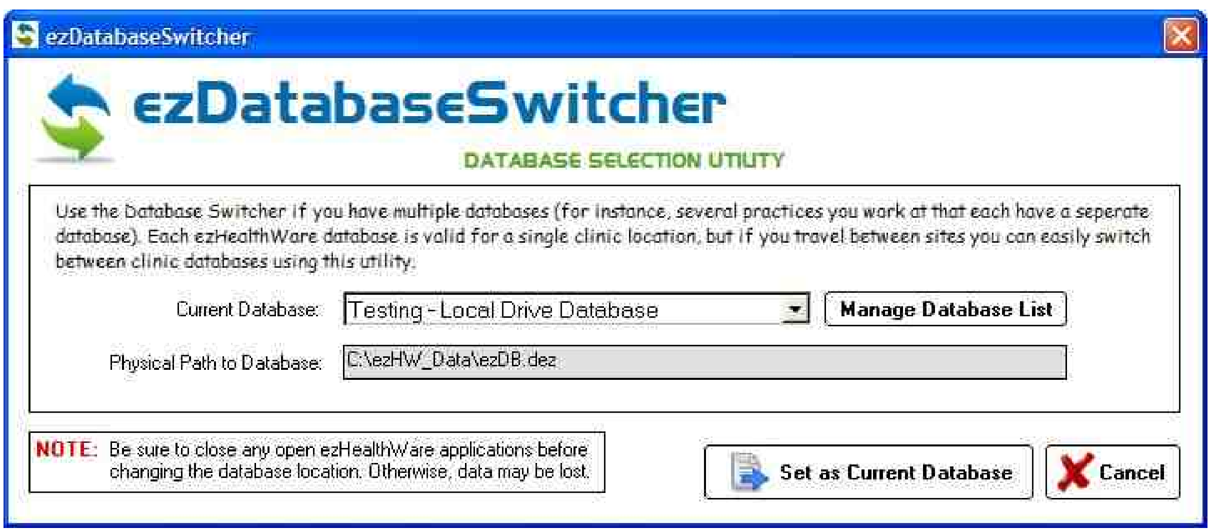
3.11 Misc Functions

Below are some of the miscellaneous functions you may need from time-to-time in the software.

Database Switcher

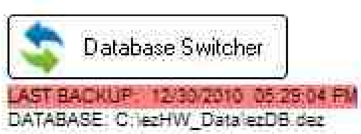
If you are using more than one database (for example, you travel between two offices and prefer to have separate databases or you work part-time doing nursing home visits) then the ezDataBaseSwitcher will allow you to change between databases with ease. The primary requirement is that the databases are kept in separate folders (whether on different computers or just different folder names). For example, you could have a laptop with two databases: one located at "C:\ezHW_Data_MainOffice" and the second at "C:\ezHW_Data_SecondOffice." To utilize both databases setup two databases by clicking the Manage Database List->New button sequence. Then by changing the database in the dropdown you can alternate between the two.

WARNING: Be sure to close all ezScriptWriter modules on this computer, since any running modules will crash if the database path is changed while running. Use the ezForceClose utility if necessary. Otherwise, possible database damage could occur.



Backup Status Bar

The last backup date is presented at the bottom left of the screen. If it has been a few days since the last backup you will see it appear in red.



Getting Help

	The quickest way to display the help is to press F1. If context-sensitive help is available it will be displayed automatically.
	Most of the screens in ezScriptWriter have a Help button that displays relevant information.

Help Select the Help item in the menu bar for additional help options.

Tip of the Day

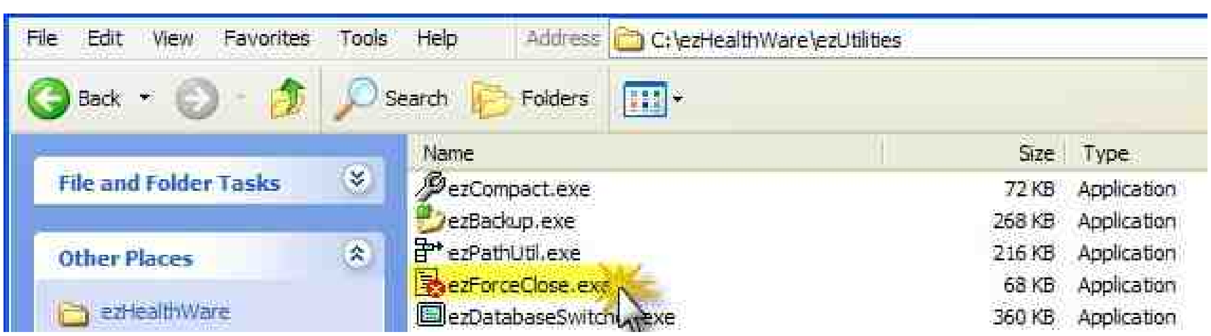
Displayed when the software first starts, you can disable the Tips by unchecking the "Show tips at startup" box. You can re-enable at any time by using the Help->Tips menu.

Suggest Features

Use this utility (found under Help->Suggest a Feature in the top menu). Use the Upload button at the bottom to send the suggestion directly to our server. We review these suggestions and incorporate them into the software when feasible.

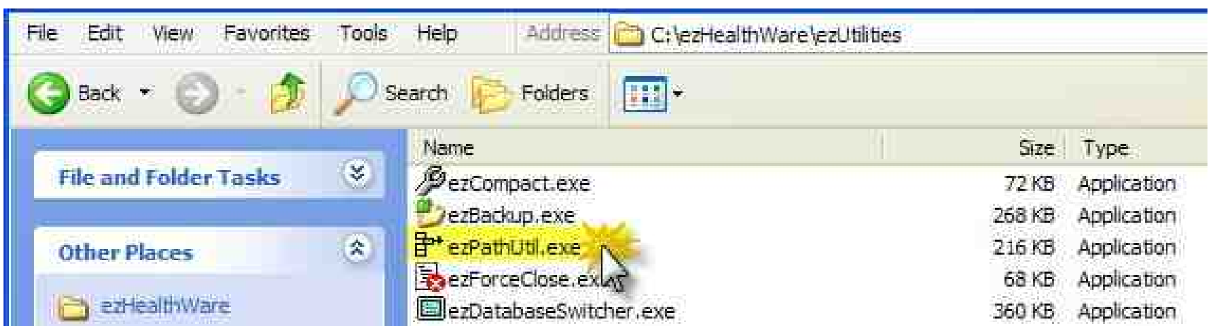
Other Utilities

ezForceClose
Located in the Program Files (x86)\ezHealthWare\ezUtilities folder, the ezForceClose program will close all ghost copies of the software running on this computer. .

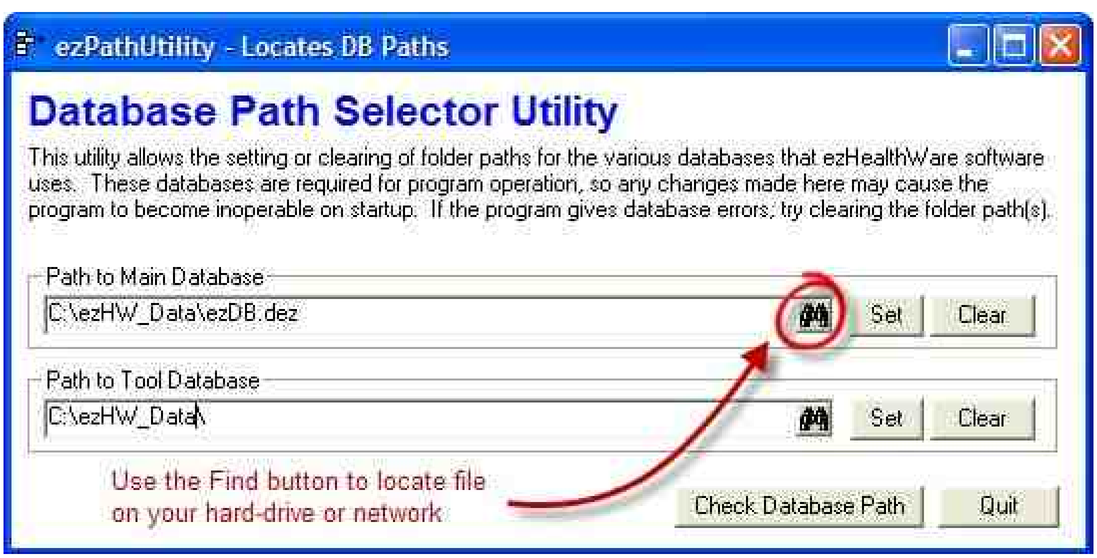


Note that if you have open work in ezScriptWriter you should save it first.

ezPathUtil
This utility allows the setting or clearing of folder paths for the various databases that ezHealthWare software uses. These databases are required for program operation, so any changes made here may cause the program to become inoperable on startup.



If the program cannot find the database on startup, try using the Find buttons to locate them. If you are re-installing the software and want a "Fresh Start" with a clean, new database use the Clear button to reset the location to the database.



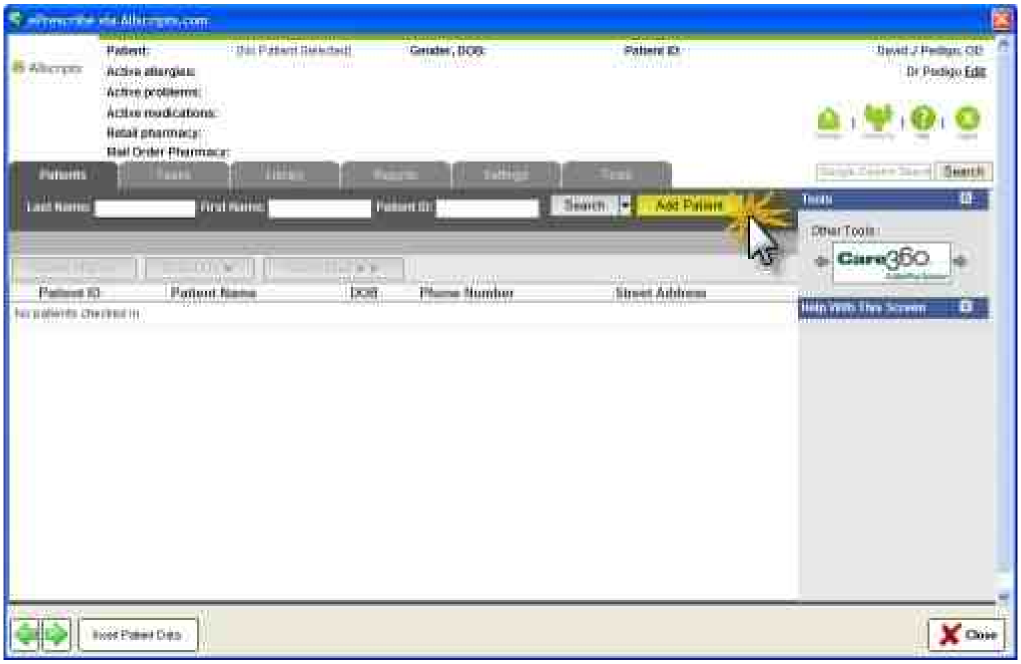
If there is concern that a networked computer is not connecting, you should verify that the path is correct. Use the Check Database Path to pull up a report of the connection status. It's a good idea to printout this report for each computer on your network in case you ever need to re-enter the paths for some reason.

3.12 ePrescribe

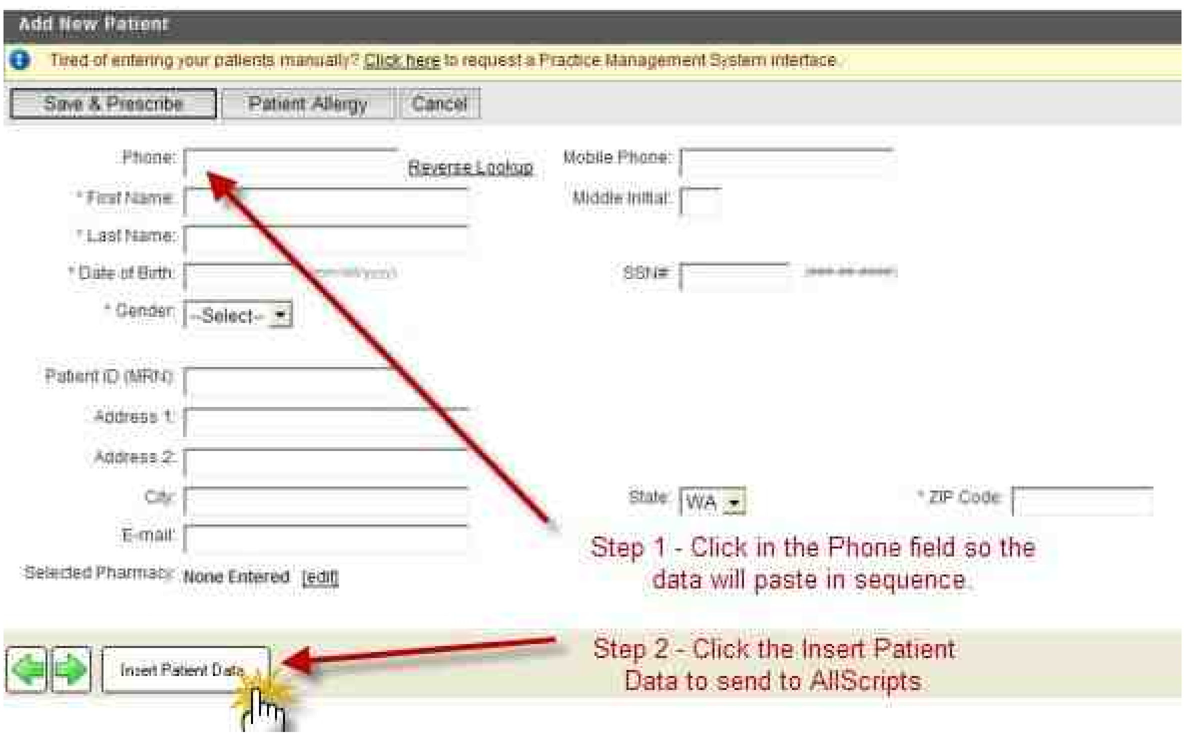
You can open the recommended ePrescribing website from the Main Screen or from the Multiple Rx Tool. A browser window will open (note that ePrescribing requires internet connection to function).

If you have an existing AllScripts account enter your UserID and Password to login. If you don't have an account yet, click the "Create an account" link to sign-up (it's free).

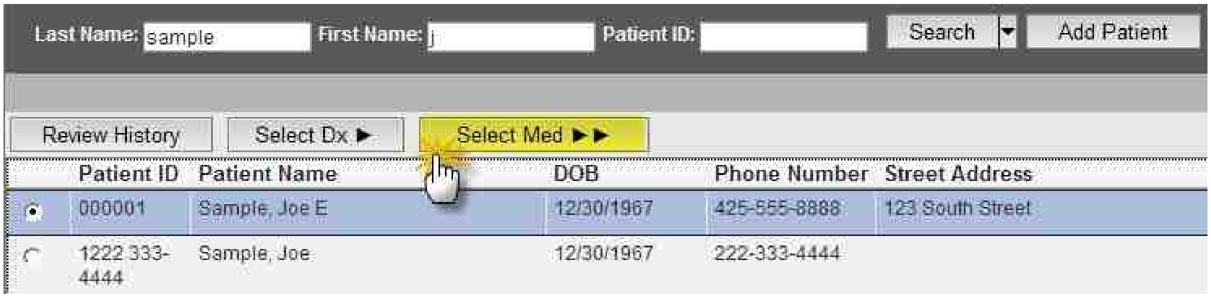
Once you are logged in, you must create a new patient account in AllScripts so your prescription can be sent to the Pharmacy:



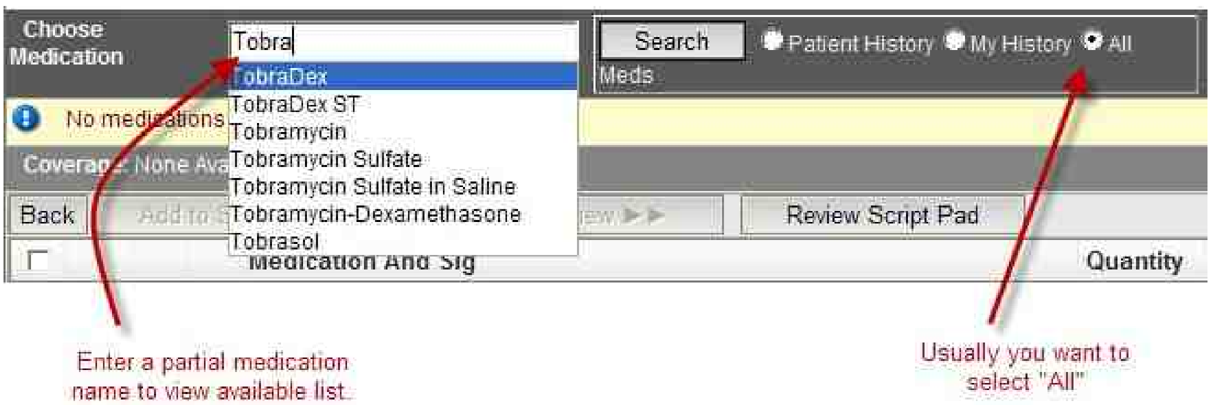
Once the Patient Data screen appears, you will need to upload the patient to the AllScripts webpage. Do this by clicking in the Phone field (to align the data sequence) and then clicking the **Insert Patient Data** button at the bottom of the screen.

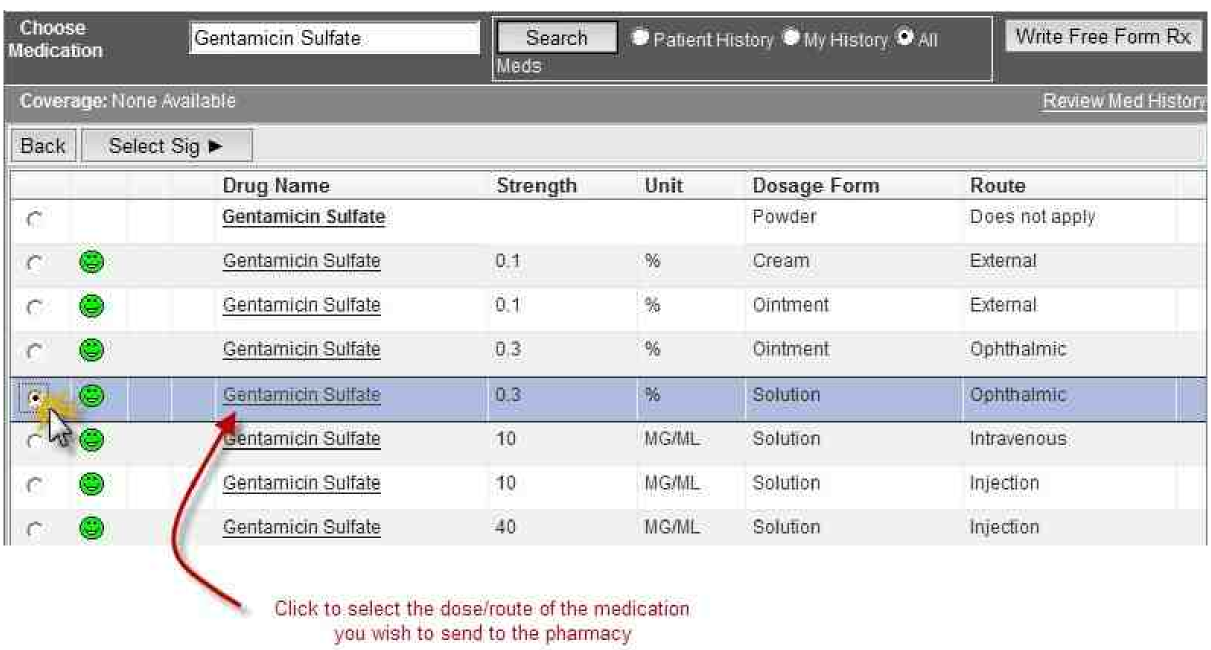


The patient should show up in the AllScripts Patient List, but if it does not enter the last and first name to Search.

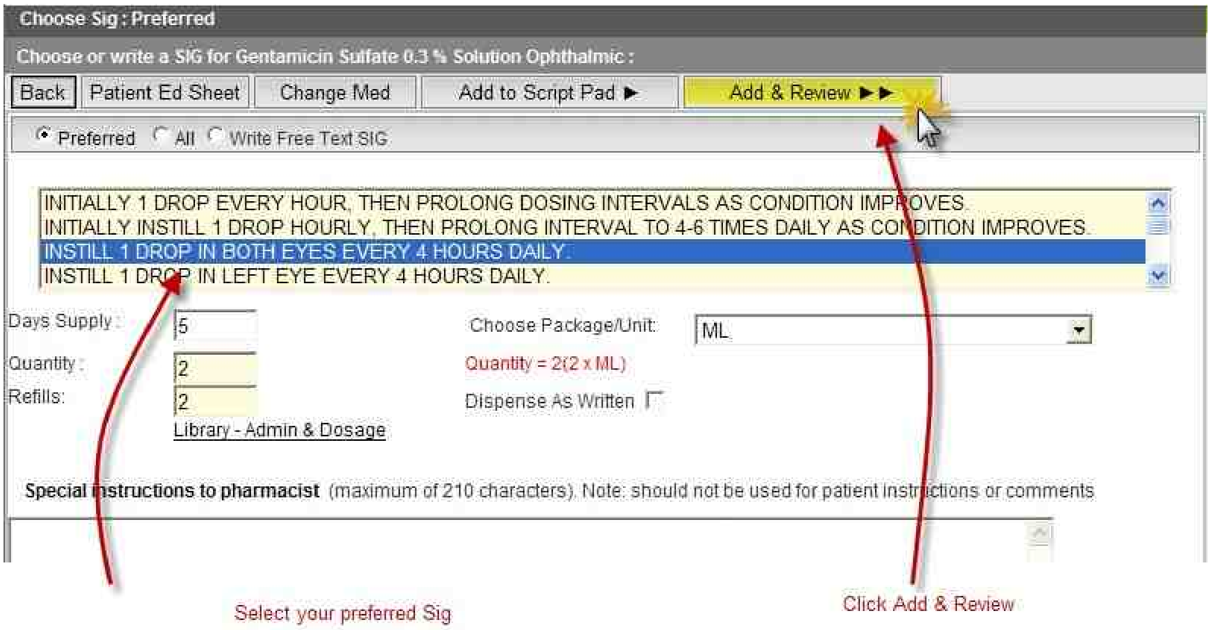


Make sure the patient is selected (black dot next to patient name) and click the Select Med button to begin the process of entering a prescription.



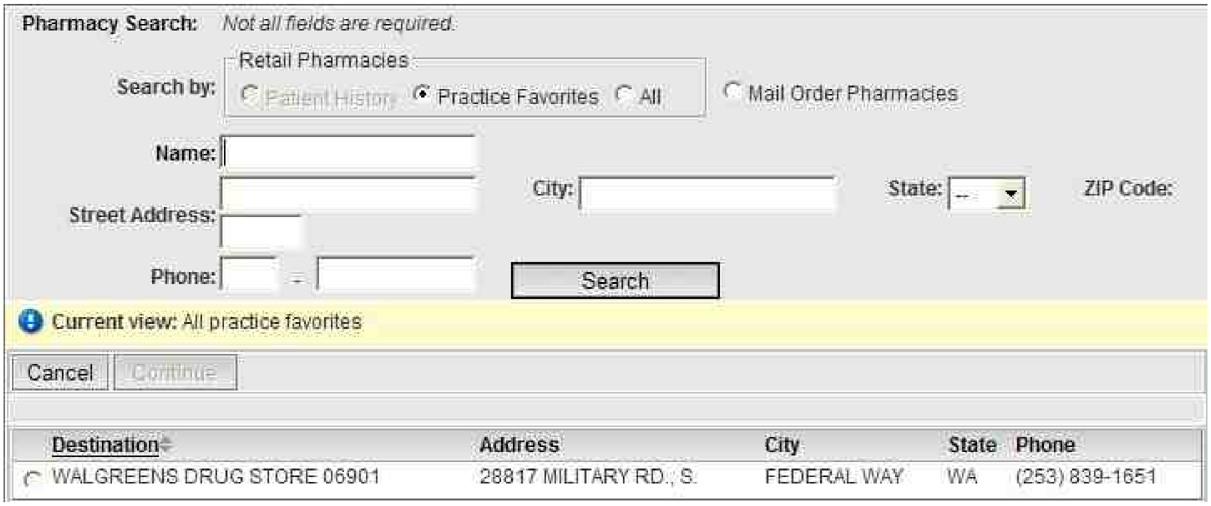


You must then click the Select Sig button to choose the Sig you wish to send with the Rx to the pharmacy:



You may see warning screens if any of the medications you selected trigger a flag (contra-indication, duplicate dose, etc):

If all is well, you will see the Select Pharmacy screen, where you can send the prescription electronically to the Pharmacy of your (or your patient's) choice:



NOTE: The ePrescribe feature is based on the AllScripts free e-prescribing website. The AllScript database can check for drug interactions and contraindications that ezScriptWriter cannot. The AllScripts site is external to our software and is not an integrated part of the ezScriptWriter (so Rx data is NOT automatically passed to the website). You have to send the data manually; the steps above help you create a Rx with the website. You should also add the medication to your LogBook, even if you don't print an actual prescription for the patient.

Part IV

4 Admin Functions

The Administrator Menu is the main portal to managing the software, including User accounts and Security Settings. In addition, you can purchase and register the software.

Software Account
Admin Settings & Options
Reset Passwords
View Audit Trail

4.1 Software Account

The Manage Software Account screen will allow you to purchase the software (via secure link), register/ license your copy, view existing licenses and change the clinic telephone (which serves as the account number).

Purchase Software
Register/License Software
View Licenses
Change Clinic Telephone Number

4.1.1 Purchase Software

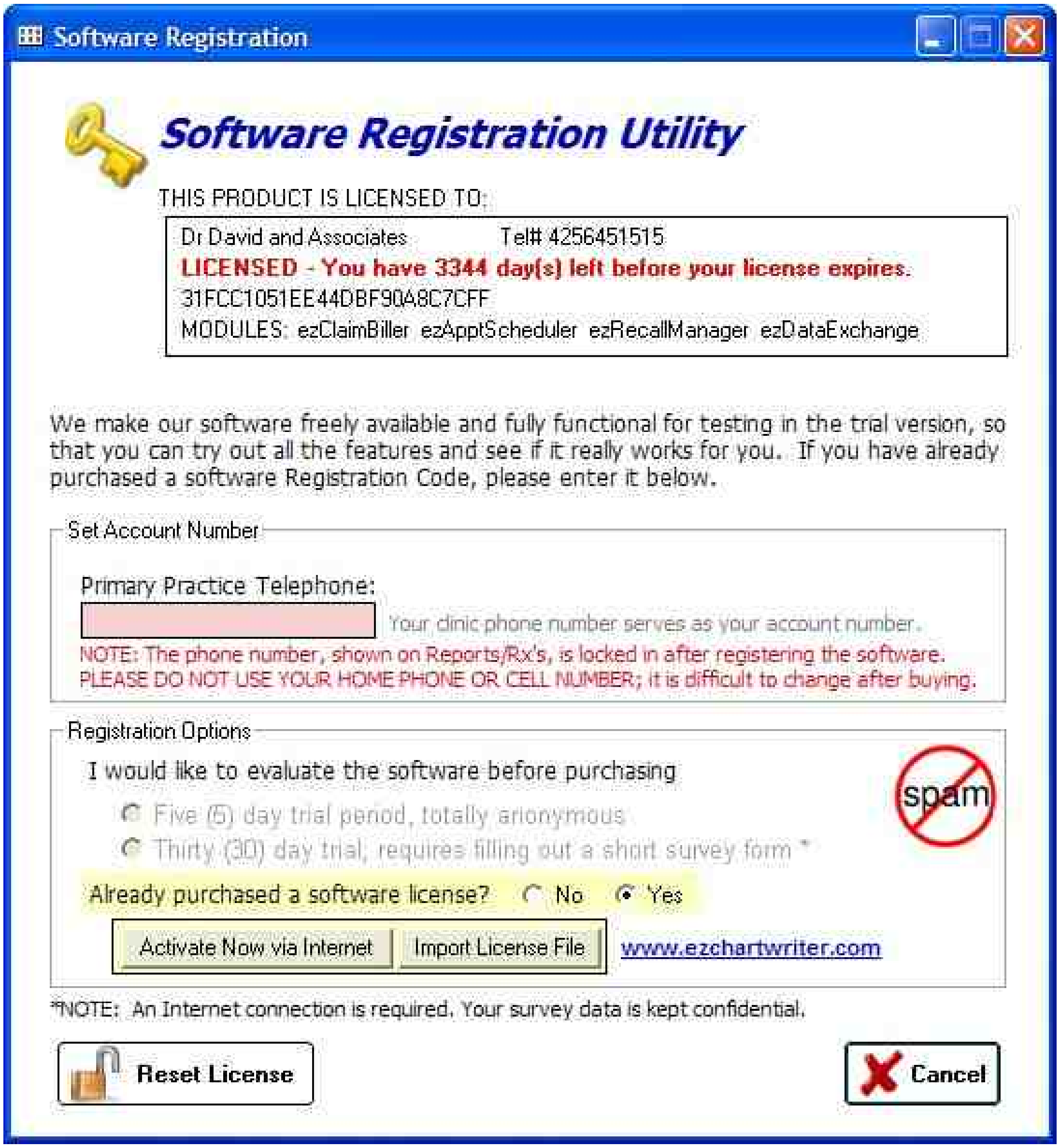
Whether you are purchasing the software for the first time or renewing your license, the Purchase Software screen will the make the process super easy. The uploading of your order is our recommended method since there is no chance of mis-entering important account information that we need to generate your license file.

You can purchase in one of three methods:

- Via secure internet connection directly to our server (with full encryption of your credit card data)
- Generate a paper order form; submit via fax or mail
- Launch the website so you can order off the ezScriptWriter website.

4.1.2 Register/License Software

This is the tool you use to update your license after purchasing. Make sure the Primary Practice Telephone is filled in with the phone number for your clinic/office. This is the number we will use for licensing. It is NOT MODIFIABLE once licensed and will display in your as you have entered it. If you wish to change it in the future you will have to use the Change Account Number instructions. You only need to license ONE time, no matter how many computers you have networked.



There are two options for updating the License File (registering your license):

Option 1 - Via the Internet
Click the Activate Now via Internet button. The software will attempt to contact our servers to retrieve your license file. Problems that can occur include:

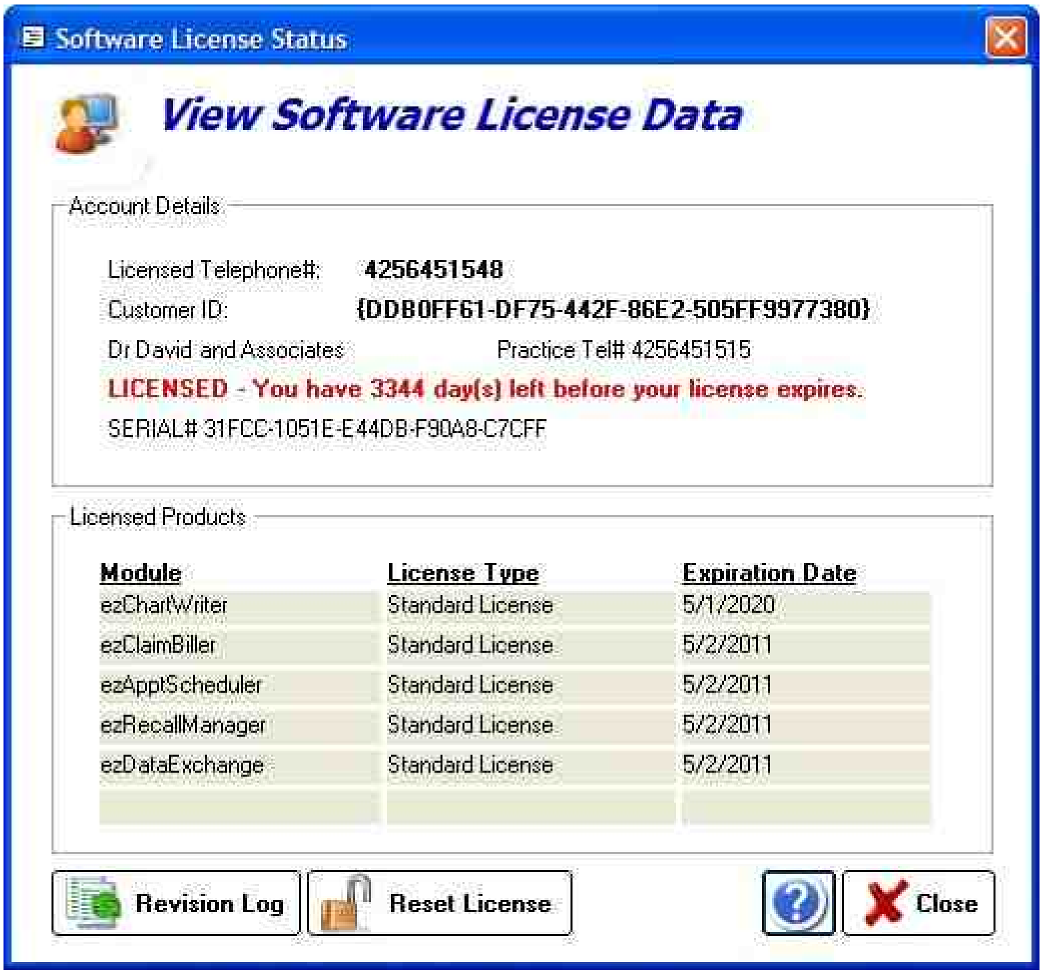
- not enough time has passed since your purchase; all orders should be updated within 24-48 business hours.
- incorrect telephone number entered (you must include the exact digits as you indicated on your purchase order, especially country and area codes).
- no internet connection present
- attempting to license the wrong version of the software (from what you purchased)
- an internet error has left our server down (very rare)

Option 2 - Import License File

If the codes were sent via email or CD-ROM, copy the license files (not the folder itself) into your database folder (typically C:\ezHW_Data). Then click the Import License File button so the license updates.

4.1.3 View Licenses

The View Licenses screen allows for a review of existing licenses and the expiration dates. Note that ezScriptWriter will begin warning you about 30 days before your expiration date that you license is due for renewal.



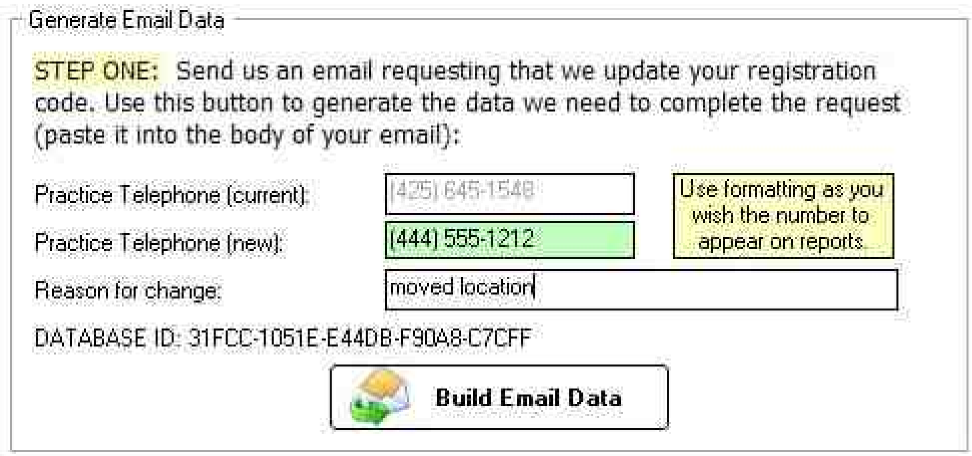
The Revision Log button will display the current list of available upgrades for the software (if applicable). The Reset License is only used when directed by Tech Support to reset your licenses in the case of error or other issues.

4.1.4 Change Account Number

To change your Clinic Telephone number (which serves as the Account number and is part of the license file), you must follow two steps:

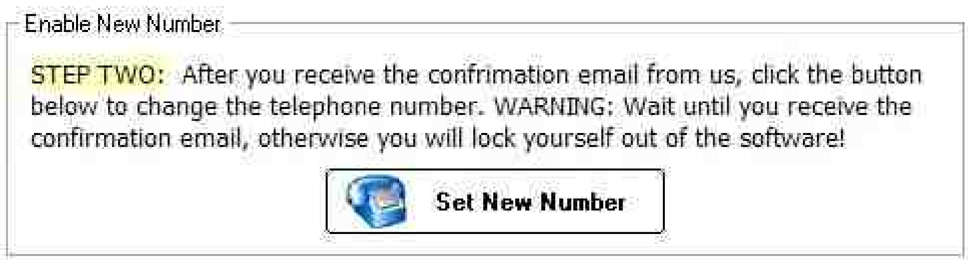
Build Email Data

Your primary practice telephone number serves as an unique identifier and is part of your license/ registration key. In order to change it (for example, if your area code changes or you move locations) you must send a request to us to have a new registration key code generated. The process may take up to 24-48 hours. We will generally verify the clinic telephone number to ensure that it is registered correctly.



Set New Number

Once you receive the confirmation email click the "Set New Number" button to make the change final. The software will automatically update your license for you (Internet connection is required).



4.2 Settings & Options

The Admin Settings & Options screens allow you to set the overall properties for the software. This includes the Clinic Details, User Security, Overall Security and International Defaults.

- Clinic Details
- User Details/Security
- Global Security Settings
- International Defaults

4.2.1 Clinic Details Screen

The Clinic Details screen allows for entry of the Practice Information, including the all-important Practice Telephone number (which serves as your Account Number). Once the software is purchased and licensed, the Practice/Clinic Telephone number cannot be changed unless done by Tech Support. You can however change the formatting of the number at any time (e.g. add parenthesis or dashes). The remaining fields can be altered in any way you wish. If you have a group tax ID number and/or NPI, enter it on this screen.

The field "Doctor Name/Title" is used in many reports/Rx's, so it should reflect your name as you wish it to appear in reports.

4.2.2 User Details

The Administrator can manage the various users (including him or herself). You can Add, Edit or Delete users (although making an existing user "inactive" is preferred). The security levels and basic information can be edited on this screen.

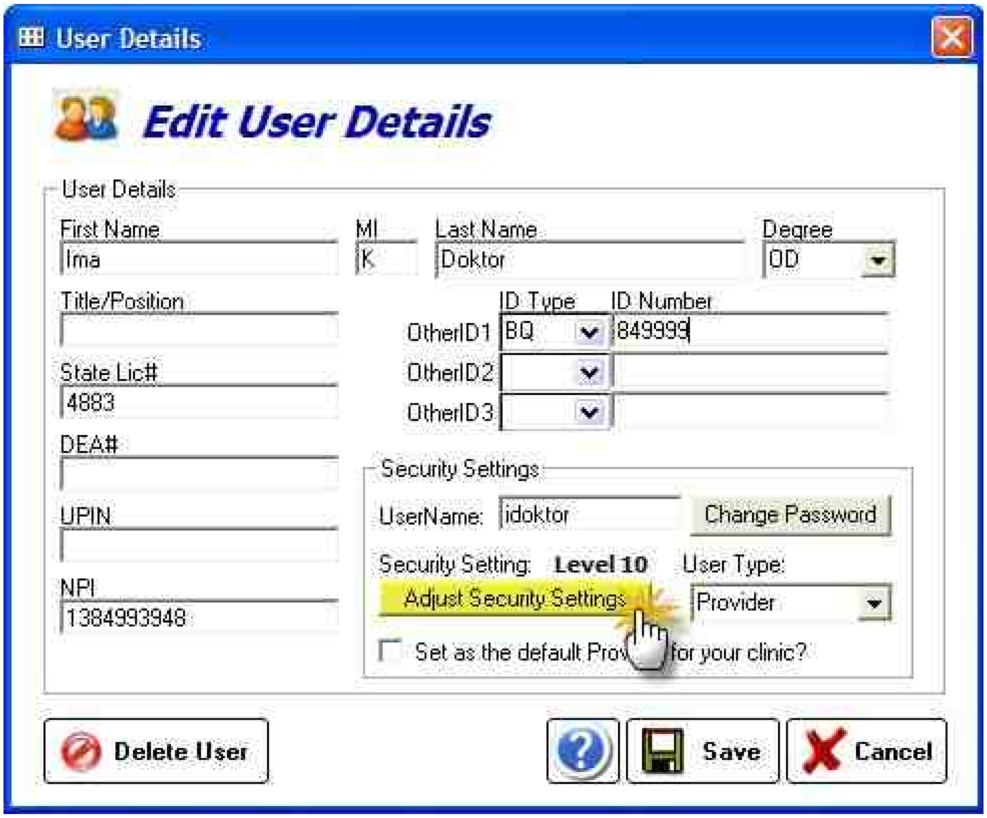
Every user will have three required settings:

User Type

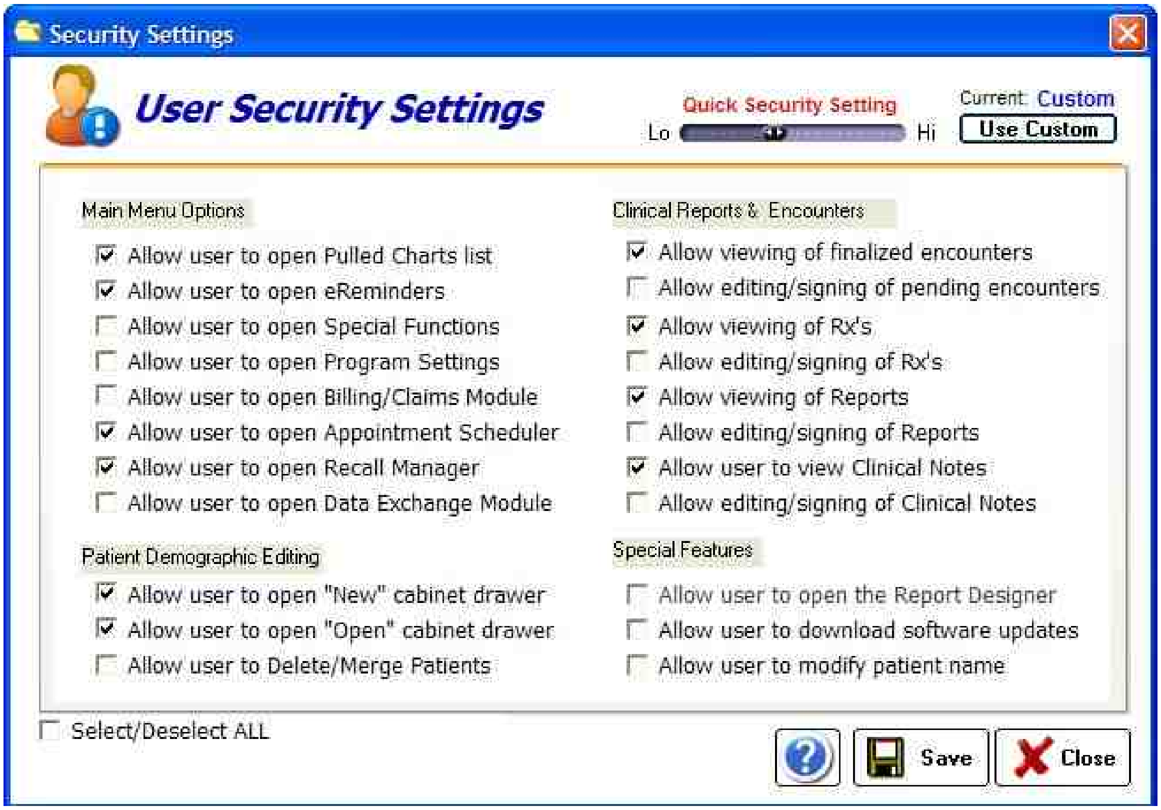
The user type can be either Staff or Provider. A staff member is someone who does not provide direct patient care; a provider is classified as someone who does provide direct care (doctor, nurse, tech). In some cases, you may wish to limit lower level providers to the Staff category to restrict access to Rx creation, although many features can be blocked by setting the proper security level.

Security Level

Security Level can be set by clicking the Security Level on the User Details screen:

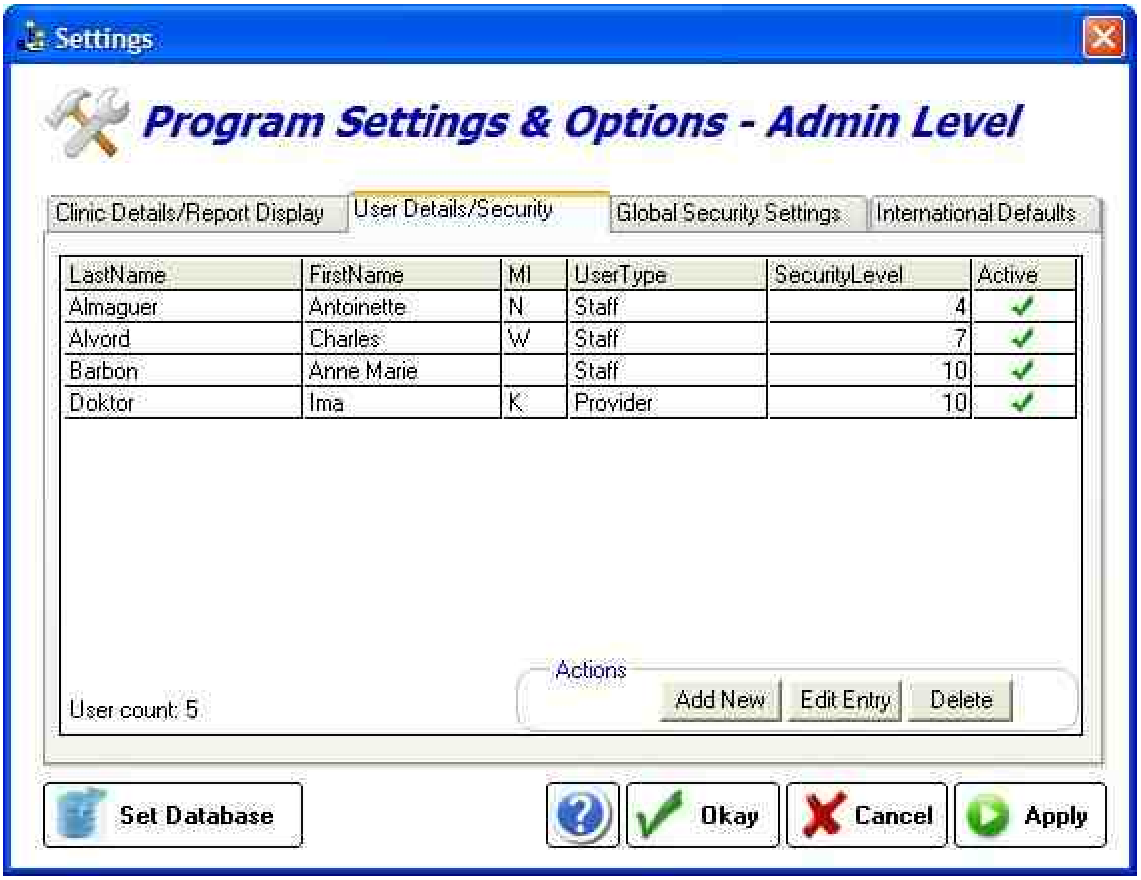


The Security Level can be set quickly using the Quick Security Settings slider (from 0, the lowest, to 10, the highest). Level 10 should be reserved for yourself, the Admin. Click the Use Custom button to modify individual settings.



Active Status

Users who are no longer with your practice should be marked Inactive, rather than being deleted from the system. Deleting a user who has created reports, Rx's or encounters will cause some difficulties with tracking. To set the status, click the checkbox under the column "Active"



4.2.3 Comprehensive Security Settings

The Global Security Settings apply globally to the software. The only entry currently customizable by the user is the Auto Log Off time.

4.2.4 International Settings

Users outside the United States will need to set the date, telephone, postal code and measurement fields to reflect their locale.

4.2.5 Locate Database

When the network link is broken or the database folder has been moved, you may need to use the Locate Database Utility. Use the Find Button (small binocular icon) to search your local hard-drive or network.

Clear Database Path
Use this button to clear the database path stored in the computer's registry. This forces the Setup Wizard to show at the software startup.

4.3 Reset Passwords

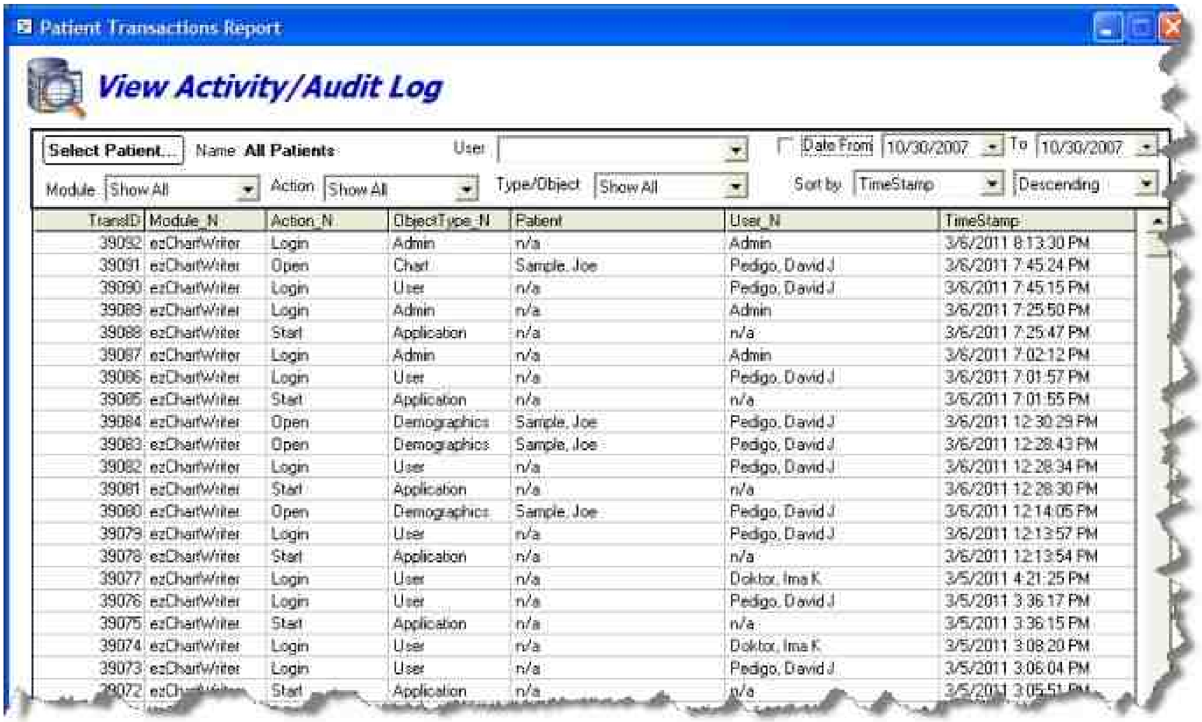
If a user has lost or forgotten their password you can reset it with this utility. Alternatively, you can reset all user passwords at once.

When the password is reset, the new password becomes the same as the username. So user "idoktor" will have the password reset to "idoktor". The first time the user logs in the software will require a real password to be entered.

To reset the Admin password, you will need to contact Tech Support.

4.4 Audit Trail

The Audit Trail is the means by which nearly all transactions of the database can be tracked. Whenever a chart is opened/accessed, a module is opened or demographics are changed an entry will be created. This tool can also be used to track logon and logoff times from the software. Click the Export button at the bottom to send the file to your hard-drive (to be opened by Microsoft Excel or similar).

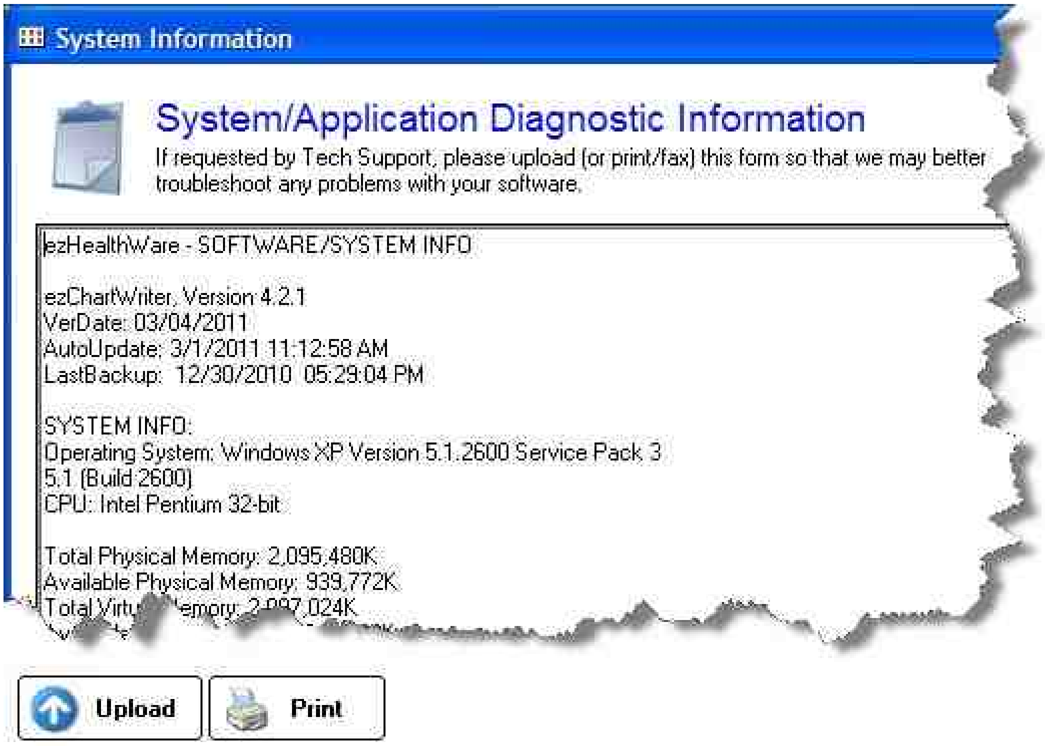


TransID	Module_N	Action_N	ObjectType_N	Patient	User_N	TimeStamp
39092	ezChartWriter	Login	Admin	n/a	Admin	3/6/2011 8:13:30 PM
39091	ezChartWriter	Open	Chart	Sample, Joe	Pedigo, David J	3/6/2011 7:45:24 PM
39090	ezChartWriter	Login	User	n/a	Pedigo, David J	3/6/2011 7:45:15 PM
39089	ezChartWriter	Login	Admin	n/a	Admin	3/6/2011 7:25:50 PM
39088	ezChartWriter	Start	Application	n/a	n/a	3/6/2011 7:25:47 PM
39087	ezChartWriter	Login	Admin	n/a	Admin	3/6/2011 7:02:12 PM
39086	ezChartWriter	Login	User	n/a	Pedigo, David J	3/6/2011 7:01:57 PM
39085	ezChartWriter	Start	Application	n/a	n/a	3/6/2011 7:01:55 PM
39084	ezChartWriter	Open	Demographics	Sample, Joe	Pedigo, David J	3/6/2011 12:30:29 PM
39083	ezChartWriter	Open	Demographics	Sample, Joe	Pedigo, David J	3/6/2011 12:28:43 PM
39082	ezChartWriter	Login	User	n/a	Pedigo, David J	3/6/2011 12:28:34 PM
39081	ezChartWriter	Start	Application	n/a	n/a	3/6/2011 12:28:30 PM
39080	ezChartWriter	Open	Demographics	Sample, Joe	Pedigo, David J	3/6/2011 12:14:05 PM
39079	ezChartWriter	Login	User	n/a	Pedigo, David J	3/6/2011 12:13:57 PM
39078	ezChartWriter	Start	Application	n/a	n/a	3/6/2011 12:13:54 PM
39077	ezChartWriter	Login	User	n/a	Doktor, Ima K	3/5/2011 4:21:25 PM
39076	ezChartWriter	Login	User	n/a	Pedigo, David J	3/5/2011 3:36:17 PM
39075	ezChartWriter	Start	Application	n/a	n/a	3/5/2011 3:36:15 PM
39074	ezChartWriter	Login	User	n/a	Doktor, Ima K	3/5/2011 3:08:20 PM
39073	ezChartWriter	Login	User	n/a	Pedigo, David J	3/5/2011 3:06:04 PM
39072	[illegible]	Start	Application	n/a	n/a	3/5/2011 3:05:51 PM

4.5 System Info

Use the SysInfo button in Admin or at the bottom of the menu Help->About ezScriptWriter to get a detailed look at the computer and software. This may be requested by Tech Support if you are having troubles.

The report can be printed, faxed or uploaded directly to our server. Please email when you upload a report so that we can review it promptly.


System Information
System/Application Diagnostic Information
If requested by Tech Support, please upload (or print/fax) this form so that we may better troubleshoot any problems with your software.
ezHealthWare - SOFTWARE/SYSTEM INFO
ezChartWriter, Version 4.2.1
VerDate: 03/04/2011
AutoUpdate: 3/1/2011 11:12:58 AM
LastBackup: 12/30/2010 05:29:04 PM
SYSTEM INFO:
Operating System: Windows XP Version 5.1.2600 Service Pack 3
5.1 (Build 2600)
CPU: Intel Pentium 32-bit
Total Physical Memory: 2,095,480K
Available Physical Memory: 939,772K
Upload
Print

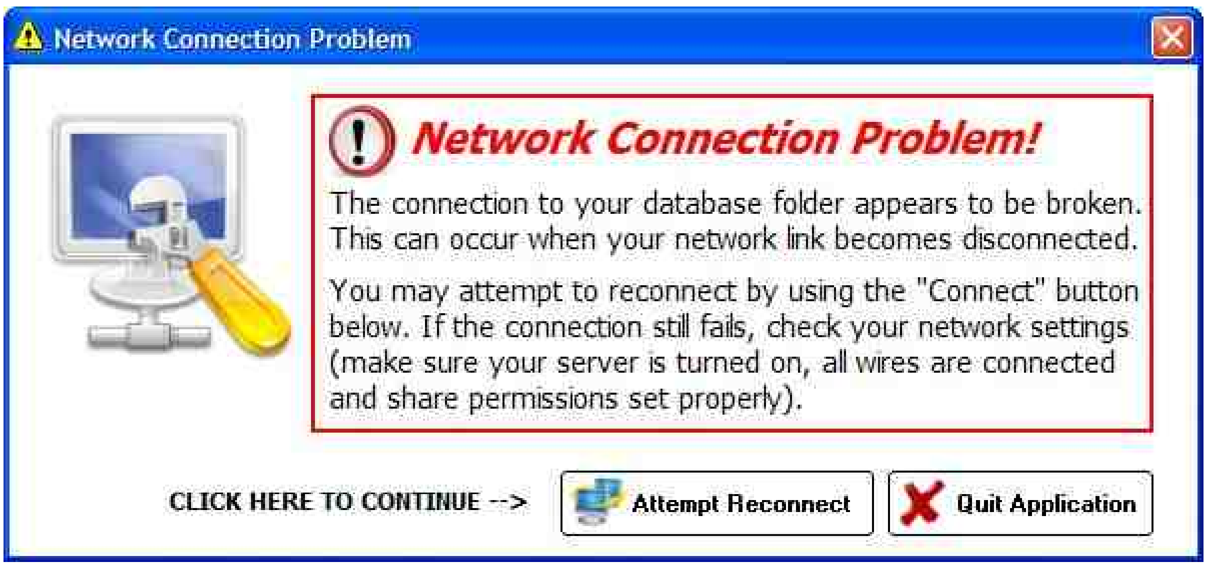
Part V

5 Troubleshooting Problems

Network Crash

Network crashes are the worst diaster that can befall your database! If you are working on a chart at the same time the network goes down, there is a high probability that you database may be damaged. Using a wireless network for a portion of your network increases the risks. Since ezHealthWare software is an intensive database-driven program, you can expect a wireless network to be slower than a typical 100Mbps wired LAN (how much slower depends on the wireless system you choose). If you must use a wireless network, it is probably best to use the exam room computer as the server and let other computers link into that system. Bad network cards and faulty cables can also be a culprit.

Broken network connections, as sometimes happen with wireless systems, can result in database corruption! **Do regular backups of your data (at least daily).**



Database Crash

You will recognize a database crash when you see this dreaded message: Unrecognized Database Format or something similarly ominous.

WARNING: **Do an immediate backup using the instructions below before doing anything else!**

(1) Make an immediate backup (copy the entire "C:\ezHW_Data\" folder to a flash drive and/or external drive (BEFORE DOING ANYTHING ELSE).
(2) Do you have an existing recent backup? If so, roll back to that copy.
(3) If it’s been a few days since your backup, send the following file to us so we can analyze and attempt to repair the database:

C:\ezHW_Data\ezDB.dez
Right-click and choose Send To->Compressed Folder to zip the file; better yet use the ezBackup utility to create a copy that's already compressed.

You can use the link we send you to securely upload the database to us (do this at the end of your workday; we will TRY and return it the next day if it is repairable). Note that some database crashes cannot be repaired and you MUST return to your most recent backup.

Software Crashes - low memory

The MOST common cause of crashes of the software is due to low memory. If you are running the software and getting persistent errors (that don't seem to have a pattern), ask yourself if you have (1) 2 or more charts open at once and (2) less than 2 GB of RAM. If so, upgrade your RAM. You can also increase the size of your Virtual RAM. This allows you to simulate RAM by using your hard drive to store the data that would be on the physical RAM.

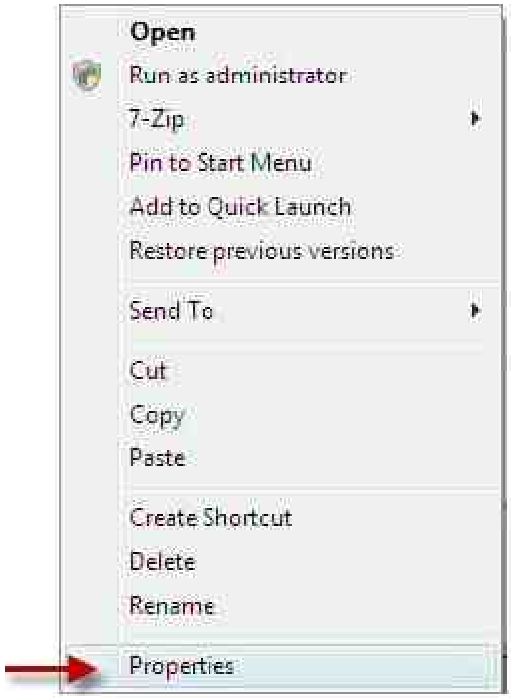
Steps to Increase Virtual Memory

1. Under the start menu go into the Control Panel.
2. Double click Performance and Maintenance and then on System.
3. Under the Advanced tab click on Performance and then on Settings.
4. Where you see Virtual Memory shown click Change.
5. Click on the hard drive where your OS is installed (this is where your paging file should be).
6. Once you have completed all of this check the Custom Size checkbox. Now you are able to input how much memory you want to save for virtual memory. There will be two fields there, the first one is called initial and the other is called maximum. If you want the best performance out of your machine you should set these the same as each other.

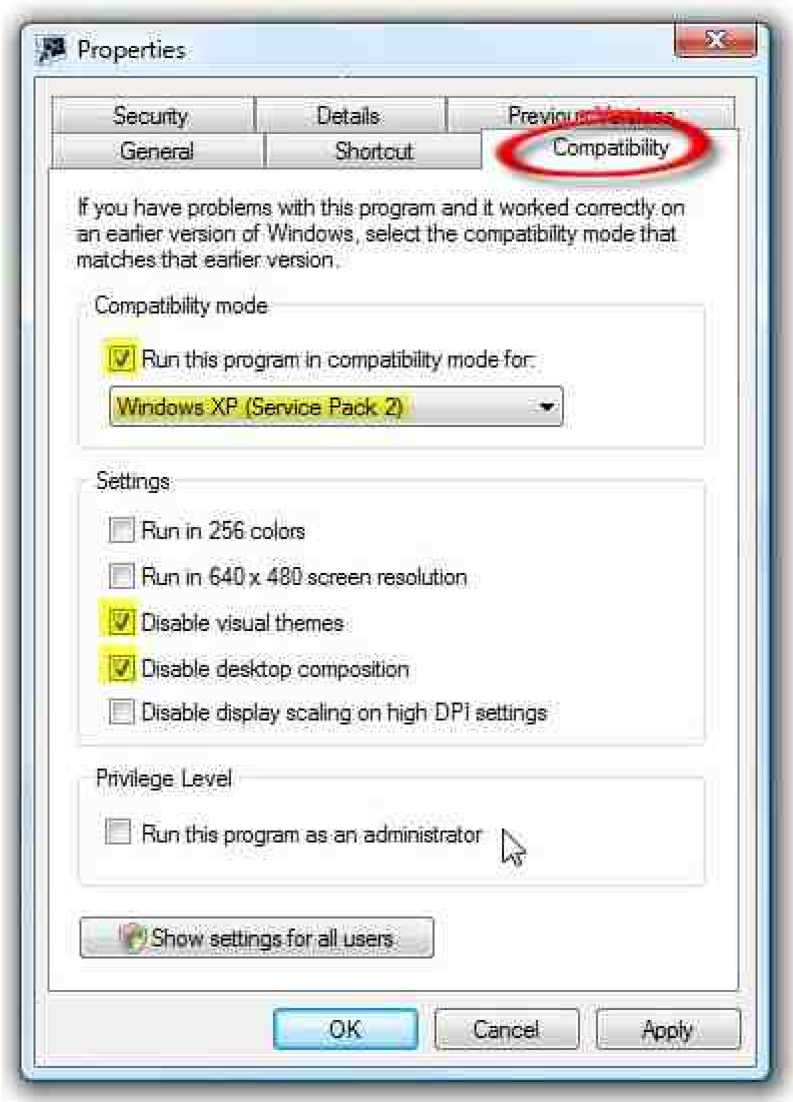
Vista Compatibility

We recommend Windows 7 Professional or WinXP for all our software products. Win7 can be either 32 or 64 bit systems. In many instances our software runs perfectly in Windows Vista. But in some situations, there may be minor, or even major, malfunctions. This is especially true for the Database Upgrade utility, Online Licensing module and scanning modules. To get around this problem, you simply need to start the software in XP Compatible Mode.

To use Windows XP compatibility mode, right-click the ezScriptWriter icon and choose **Properties** from the context menu that appears:



After choosing Properties from the context menu, a window will appear displaying the different properties of the application organized in tabs. Select the Compatibility tab to run the application Windows XP mode:



On this screen, place a check in each of these checkboxes:

- Run this program in compatibility mode for Windows XP (service pack 2)
- Disable Visual Themes
- Disable Desktop Composition

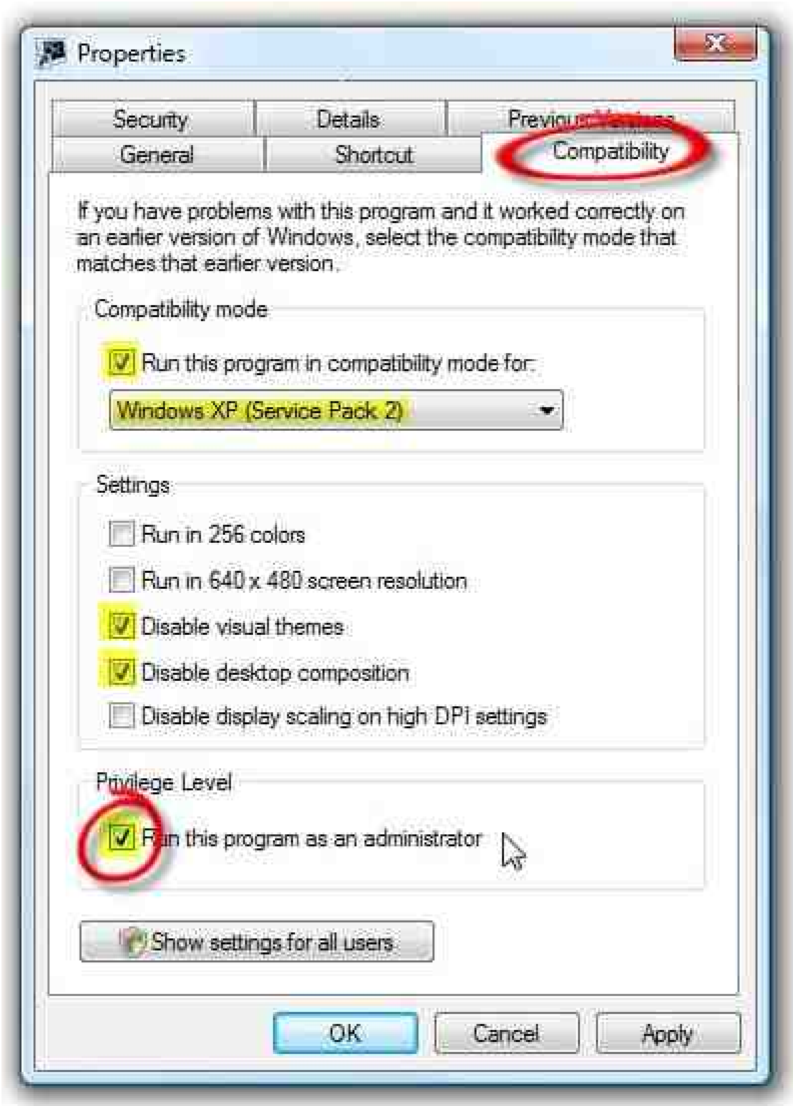
Then click OK to save the changes.

NOTE: If this does not work and problems remain, try running the Program Compatibility Wizard by clicking the Start button, clicking Control Panel > Programs > Programs and Features > Use an older program with this version of Windows

If compatibility mode and the wizard does not solve the problem, contact Tech Support for further help.

Upgrading Database Fails

If your attempts to upgrade your database fail, you may need to run the software as an Administrator (in Vista/Windows7). Right-click the application ezScriptWriter.exe and choose **Properties** from the context menu, a window will appear displaying the different properties of the application organized in tabs. Select the Compatibility tab to run the application Windows XP mode and check the Run as Administrator checkbox. Once the database has finished upgrading you can uncheck the box.



Locked Chart

If you attempt to open a chart that has already been opened by yourself or another user, the Locked Chart warning appears. A problem may occur when a chart was opened and the software crashes leaving the chart still marked as open. If this is the case, then it is safe to use the "Unlock Chart" button. If you are unsure or another user may possibly have the chart open, it is best to check with other users before attempting to unlock the chart.

Uninstalling the Software:

(1) In the Windows Control Panel, click the "Add/Remove Programs" icon.
(2) Find the entry for ezScriptWriter and click "Remove"
(3) Navigate to "C:\Program Files" and delete the entire folder "ezHealthWare"
NOTE: This does NOT delete the patient database. To delete the existing database use the topic "Instructions to do a Fresh Start (with empty patient database)".

How to Rollback to Prior Version of Software

Starting in version 4.0 and later, the software retains the prior version so your can rollback if your have problems (for instance, your database did not fully upgrade and the new version does not start). To switch back, you simply need to recreate an icon on your desktop for the old version. Navigate to your program folder (typically it is “C:\Program Files\ezHealthWare\ezScriptWriter”, although on 64-bit systems select “Program Files (x86)”). Be sure it is NOT the ezHealthWare 4.0 folder, you need the one without “4.0”. Now find the file called “ezScriptWriter” and double-click it.

Alignment Problems with Claim Printing

There are two reasons that claims may be misaligned:
(1) The text is spaced properly, but prints slightly offset from the boxes. This can be fixed by adjusting the margins with the Alignment tool. You will have to use trial and error to move the text up/down or right/left.

(2) The problem may be with the font, not the alignment. On some computers the default system font is "proportional" and so all the text is squeezed together. To fix the issue, you must select a different font. On the alignment tool, select the font "Lucida Console" or "Courier" and font size "12". That should fix the alignment problem (you can try other fonts if it doesn't, but these usually work best).

Insurance Address & Name Not Printing

The insurance will only print on the upper right hand side if it is an existing insurance from the drop-down list (which you select in the Patient Demographics screen). If you mistype or hand-enter the insurance name, it can't be matched to an existing insurance company in the database.

If you wish to add or edit an insurance company, use Main Menu->Program Settings->Insurances in ezScriptWriter or within the ezClaimBiller module you can use the top menu Options->List of Insurance Plans

Dealing with a Total Network Outage

(1) Keep a 4-GB USB stick drive handy (empty)
(2) Keep a laptop computer in the office with the newest version of ezScriptWriter installed. But don't run the software yet, since it doesn't have a database to attach to (yet)
(3) When you have a network emergency, use the USB stick drive to copy the database folder from your server to the stick drive. You need to copy the five files that end in ".dez" to a folder on the stick drive you create called “ezHW_Data”.
(4) Once the files are copied, insert the stick drive in your laptop.
(5) Start ezScriptWriter on the laptop. If it's the first time run, it will show a setup screen and as whether you've installed before... say YES and select Find Database. Link to the files on your USB drive. If you have run ezScriptWriter before on this computer, it will open to the blank database. Simply click Switch Database on the main screen and select the location on the stick drive.
(6) Now you can enter data normally on your laptop... for instance working in your exam room right on the laptop.
(7) When your network is operating again, you need to copy the database files back on to the server. Be careful that you are copying FROM the usb drive TO the server.
(8) Restart computers on your network and they should be back to normal operations.

Part VI

6 Software License Agreement

This ezScriptWriter Software End-User License Agreement ("EULA") is a legal agreement for the ezScriptWriter Software Product in which this EULA is contained, which includes computer software and may include associated media, printed materials, and "online" or electronic documentation (collectively the "Software Product"), between you and ezScriptWriter Software. ("ezScriptWriter Software"). By installing, copying, or otherwise using the Software Product, you agree to be bound by the terms of this EULA. You must indicate your agreement to be bound by the terms of this EULA by pressing the "I ACCEPT" button on the Software Product's installation program, or else you will not be able to install the Software Product. If you do not agree to the terms of this EULA, you may not install or use the Software Product; you may, however, within 30 days of your initial purchase of a copy of the Software Product, return the entire copy of the Software Product (including all computer media, packaging and documentation) either to ezScriptWriter Software's Customer Service department or to the retailer from which you purchased the Software Product, for a refund of the amount indicated by your sales receipt for the Software Product, in which event your rights under this EULA are immediately terminated. If you are installing the Software Product on a computer that is not owned by you, you are bound to the terms of this EULA both in your individual capacity and as an agent of the owner of the computer, and your actions will bind the owner of the computer. You represent and warrant to ezScriptWriter Software that you have the capacity and authority to enter into this Agreement on your own behalf as well as on behalf of the owner of the computer the Software Product is being installed upon. For purposes of this EULA, the "owner" of a computer is the individual or entity that has legal title to the computer or that has the possessory interest in the computer if it is leased or loaned by the actual title owner.

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Third Party Works. To the extent that any third party's intellectual property is incorporated within the Software Product, you agree that such third party is a third-party beneficiary of the terms of this EULA to the extent of the third party's license to ezScriptWriter Software.

Samples. The Software Product may be provided with certain "Sample Patients" intended to demonstrate use of the Software Product or provide a base starting point for use of the Software Product. Sample Forms includes forms, templates, database records, charts, or similar items. If Sample Patients are provided, they are considered part of the Software Product for purposes of this EULA.

General. This EULA constitutes the entire agreement between you and ezScriptWriter Software concerning the Software Product. No terms of any purchase order, acceptance, purported amendment, or any document or communication other than an agreement expressly agreed upon in writing by a duly authorized officer of ezScriptWriter Software shall replace, modify, amend or override this EULA. If any provision of this EULA is held to be unenforceable for any reason, such provision shall be reformed only to the extent necessary to make it enforceable, and such decision shall not affect the enforceability of such provision under other circumstances, or of the remaining provisions hereof under all circumstances. No waiver by ezScriptWriter Software of any breach of any term or provision of this EULA shall be construed to be a waiver of any preceding or succeeding breach of the same or any other term or provision hereof. Our various rights and remedies hereunder shall be construed to be cumulative and no one of them is exclusive of any other or of any right or remedy allowed by law or in equity. This EULA shall be governed by and construed in accordance with the laws of the State of Washington, USA (without regard to its choice of law principles), except to the extent the local law of your local jurisdiction requires use of your local jurisdiction's law, and shall benefit ezScriptWriter Software, its successors and assigns.